Chelmsford City Council

User Guide:

People Manager

Employee Self Service User Guide

Contents:

Getting Started

The iTrent system is a web based integrated HR / Payroll system. A connection to the internet is required to log in.

Please ensure that you have:

1. Links to access the system.
2. A user name (your Payroll / Personnel number) and password for log on.

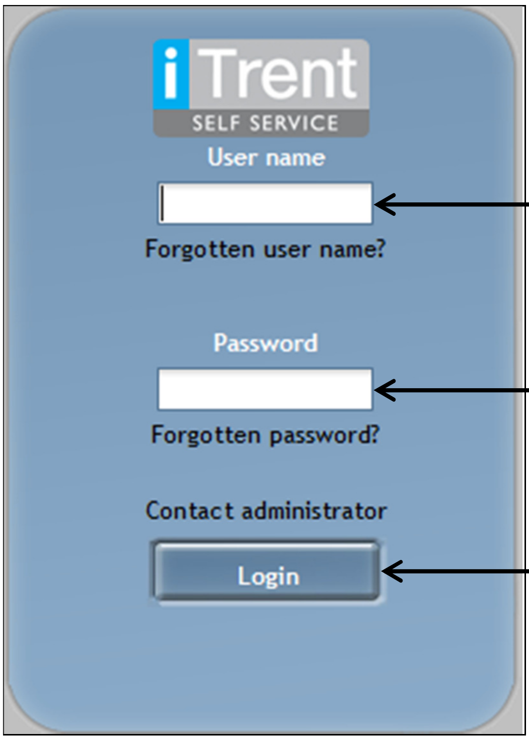
iTrent People Manager is accessed through your internet browser or from a link under HR/Payroll within the intranet home page.

Go onto the internet as you would usually do and type the following URL:
https://chebcli.webitrent.com/chebcli_web

You could add the link to your bookmarks, favourites or create a shortcut on your desktop to easily access it next time. If required, the link is also available on the home page of the intranet.

Login

Enter your user name and your password. This will be the same as your Employee Self-service user name and password, if this is the first time you have logged on to the system then the system will prompt you to change your password.

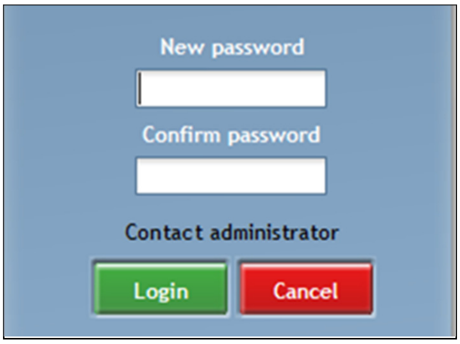


In the User name field, enter your user name. This will be your 5 digit payroll number. You can find this on your payslip.

Enter your password here. If this is the first time you've logged in then use the password you were given by the system administrator.

Click the 'Login' button. If this is the first time you've logged in then you will be prompted to change your password.

If you are prompted to create a new password, it should contain a capital letter and number and be at least 6 characters long (e.g. MyPassword2).

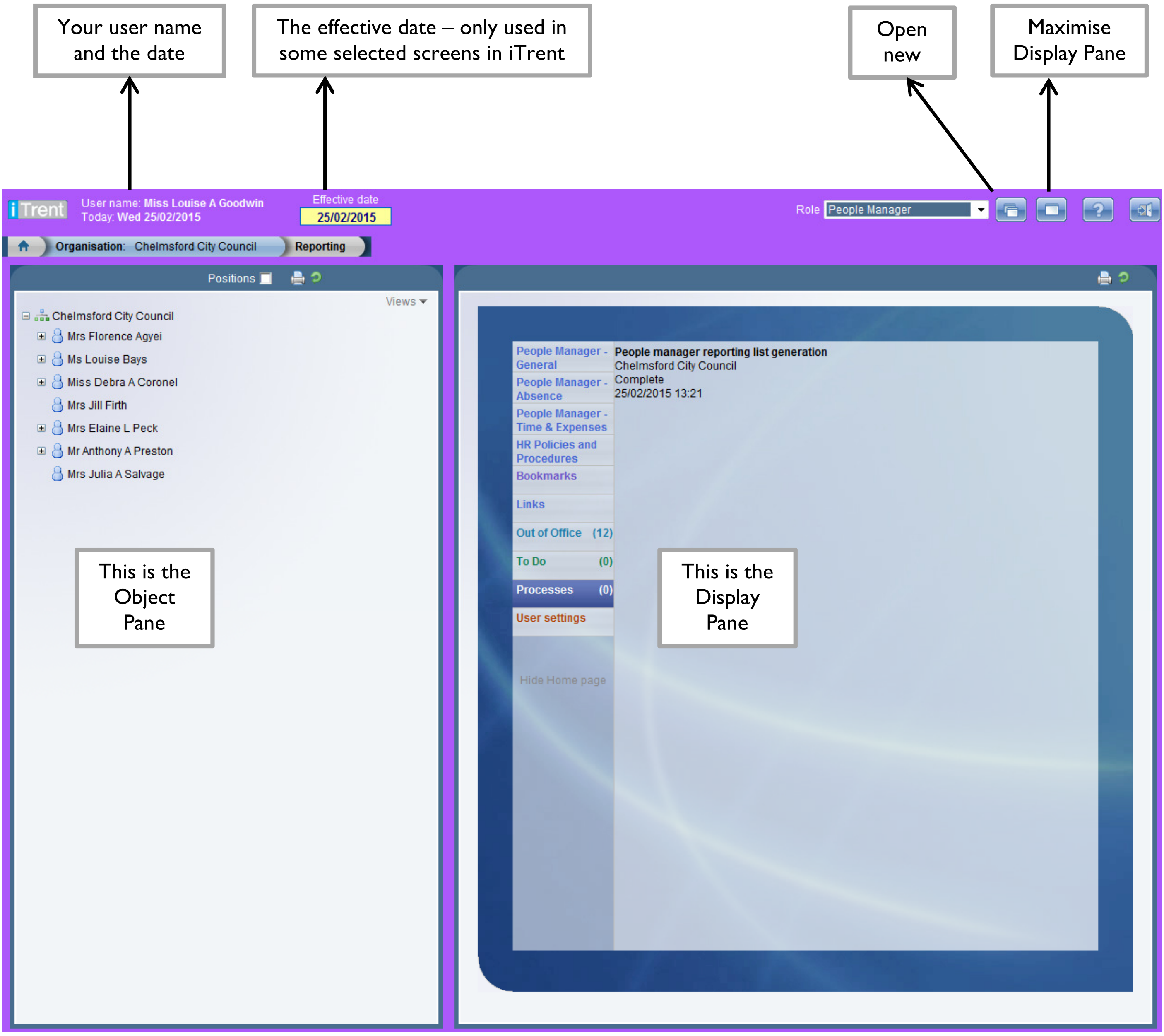


If this is the only access you have to the system then it will log you straight into your 'People Manager' user profile.

NB: If you have access to the system for other reasons then you will be presented with a drop down list asking which profile you would like to be logged in as.

People Manager – Home Page

Once you've logged in, you will be presented with your home page. Below shows a summary of all the actions available to you within People Manager.



 - Return to the home screen

 - Page help

 - Exit iTrent

- The navigation trail

The People Manager role in iTrent has been set up so that the page that you require can be accessed via a link from the home page. Specific links to iTrent pages for a People Manager can be located on the 'People Manager' tab, as per above screen shot shows in the display pane.

Upon login to a people manager profile the system will compile current access rights based on current reporting lines. This ensures that managers can only access information for people whom they are allowed to see (i.e. their direct reports and reports below this). Once this is compiled you will get a message (similar to that in the screenshot) advising that this has been completed.

1. People Manager – General Tab

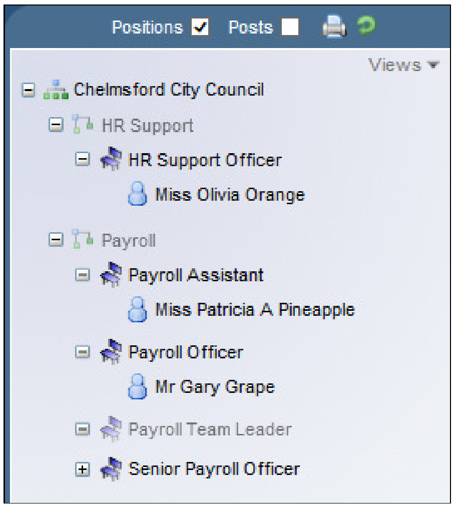
1.1. Using the view staff options

When opening people manager you will be presented with a view of your staff in the object pane. By default this will be the reporting hierarchy as shown in the screenshot. You can however amend this further. Firstly you could add in positions to the reporting hierarchy, this will then show any vacant positions there may be in the structure (screenshot A). Do this by ticking the box 'Positions'. You can also view your staff in flat view (screenshot B), semi hierarchical view – will often be similar to flat view for small areas. Or People Search (screenshot C), which is often the most useful view after the reporting view – and maybe more useful for managers who have large areas. (Note: People search will also present you with all previous reportees in the past 366 days, as well as the option to also view leavers in the past 366 days).

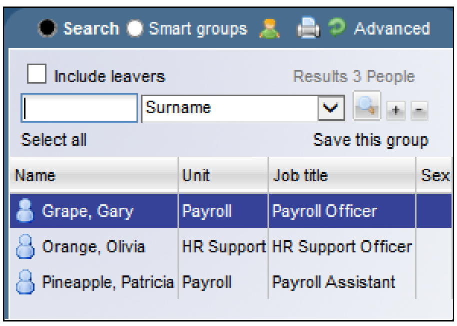
To access the different views click on 'Views' in the top right corner of the object pane. To get back to the reporting views from the people search click on the little person icon (next to the print icon) in the object pane.

Screenshot A:

Screenshot B:

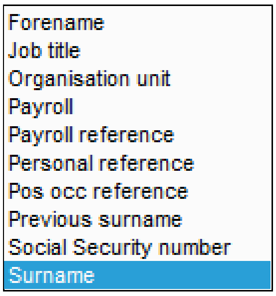


Screenshot C:

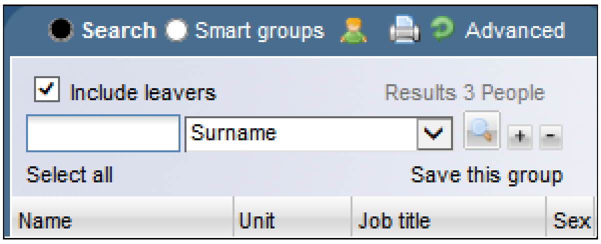


It is important to understand the views as it will help you to access the information you require. For example reporting view will help you see which member of staff reports to which manager, whereas People search enables you to do a search on (for example) a particular part of the job title or name. People search is explored further below (if required).

The people search option will enable you to do searches on current employees based on some criteria. The simple search gives you the option of the following:



You can also search leavers up to 366 days before today's date by selecting the 'Include Leavers' check box

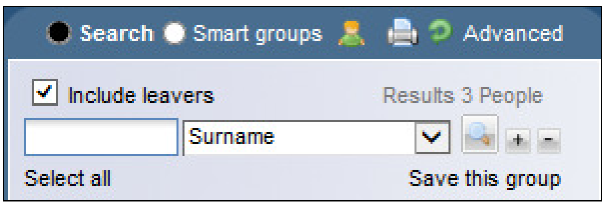


Alternatively you can also capture previous staff members by changing the effective date at the top of the screen. This will provide you with employees as of that effective date, this will also work up to 366 days before today's date.

To search click in the box, type the search and press the magnifying glass. You can search part of a word / reference number etc. by typing the first part of it or if you know part of it put an asterisk at the beginning i.e. For Grapes a surname, you may type: Grap or *rap. This will return anyone who meets the criteria.

TIP - Always be aware of the effective date as it may affect the results of searches as well as data of employees and positions.

The people search also gives you the opportunity of using advanced search. To perform a search using this, click on the 'Advanced' link at the top of the object pane. This will open some available criteria in the display pane.

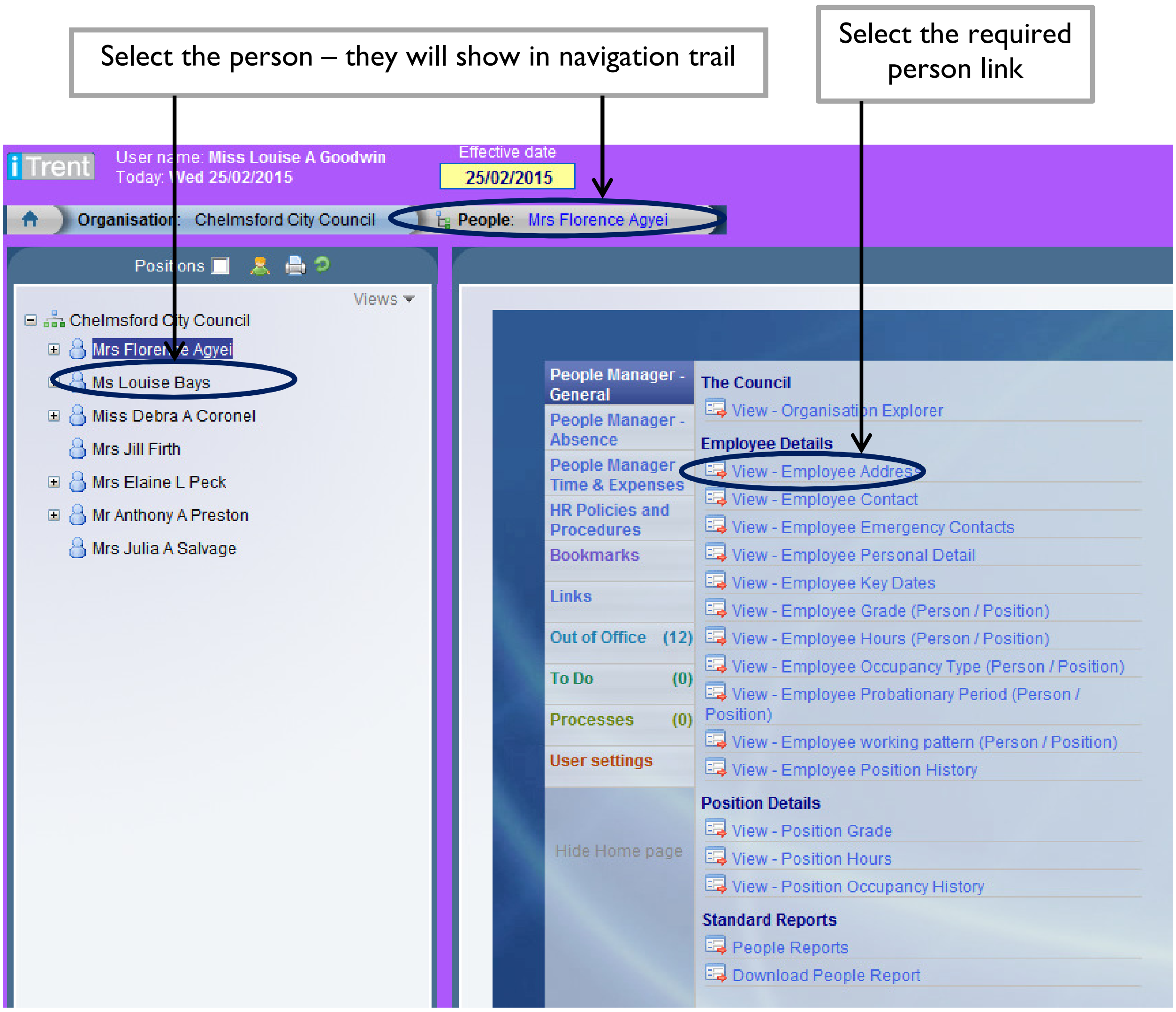


To find employees that meet specific criteria click on the first field box – but be aware the search criteria available is limited. Use the plus button and use of the 'Build special Criteria' to add additional criteria as needed. Press search once complete – matches will be displayed in the object pane. Most managers will not require use of the advanced search functionality, if you do require any support with this then please feel free to contact a member of the HR team who can talk you through this.

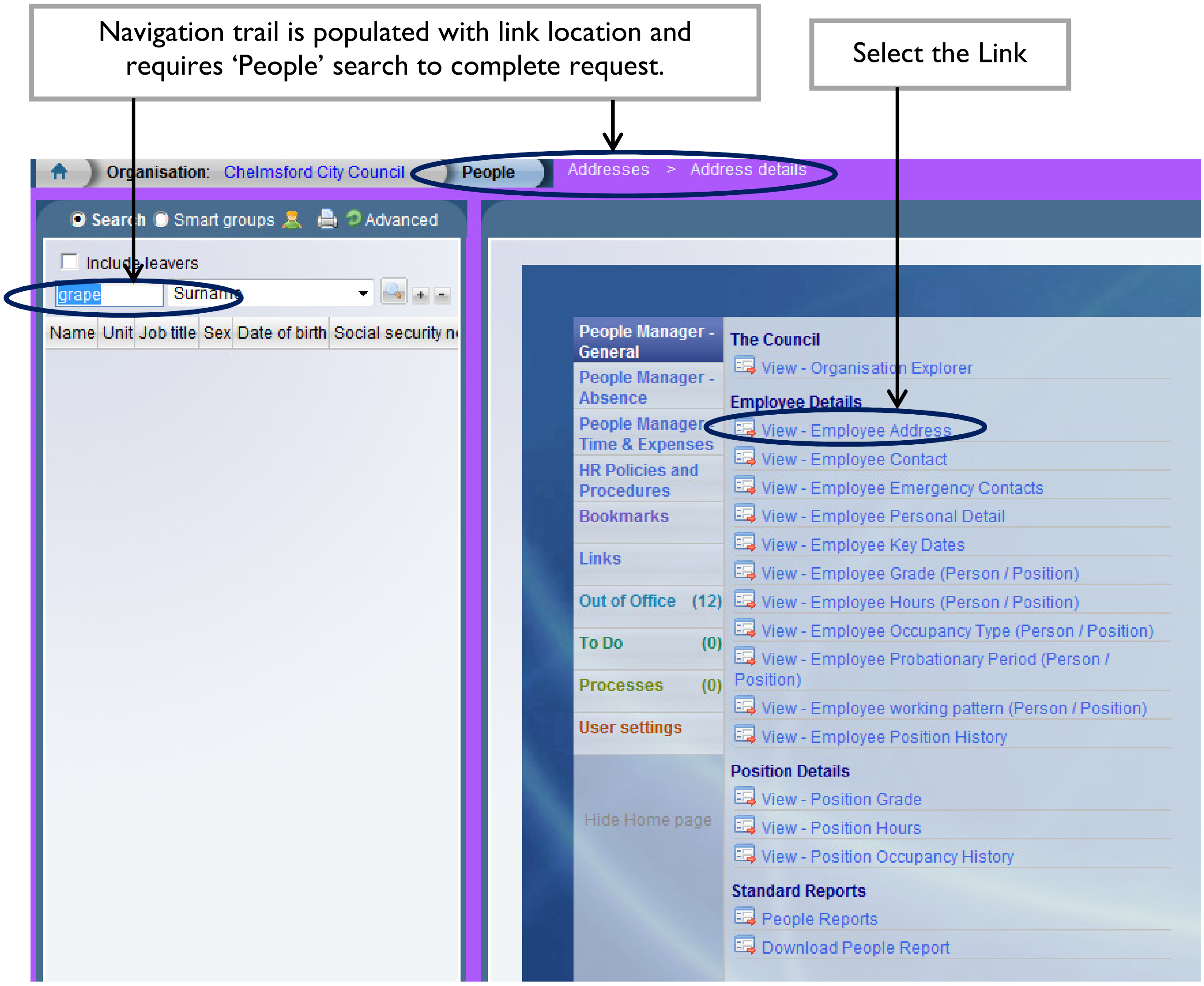
1.2. Use of People Manager – General Links

The people manager links work in one of two ways. The first is that you can find the person / position you need information for and then click on the appropriate person or position link OR you can start by clicking on the link and this will prompt you for a search of the person you require.

For method A, search for the person or position via the preferred search. Select the person or position (this will highlight the person and add the person / position to the navigation trail), next click on the required link.

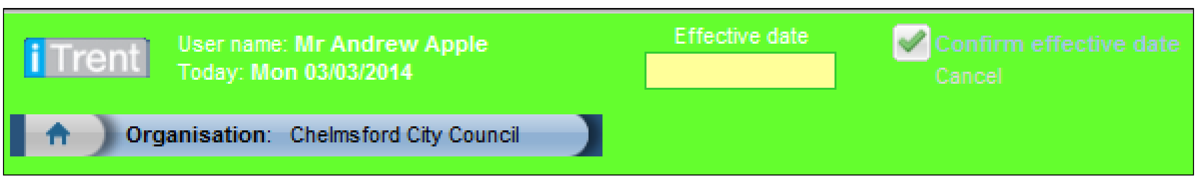


For Method B make sure that you are at the beginning of the organisation with nothing selected. (Left click on the word Organisation in the navigation trail if required). Select the link in the People Manager tab. The system will prepopulate the navigation trail and will then prompt for the criteria it requires to complete the trail (i.e. the person or position).



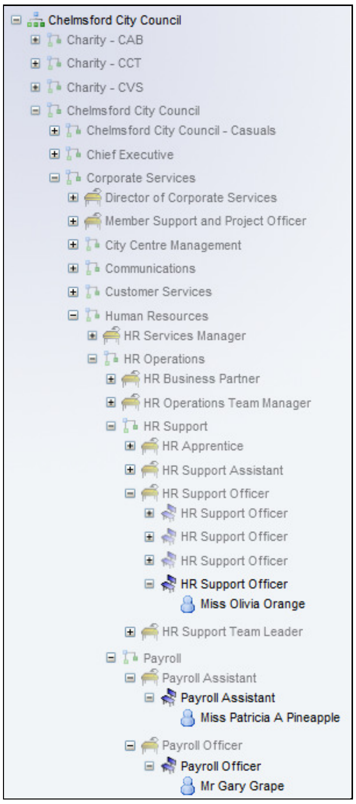
1.3. Organisation Explorer

The organisation Explorer option allows you to see the structure of the organisation in a similar way to the hierarchical view, however, you will be able to see the whole organisation with areas that are not accessible in grey. Once the link is pressed the system will ask for an effective date.



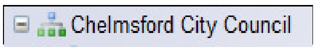
If you are looking as of today's date put in 't' and click the tick. If you are looking at a different day in this month of this year just type the day (i.e. 23 for 23rd of this month of this year).If you are looking as of a specific day and month in this year type the day and month (no need for

spaces etc. i.e. 2308 for the 23rd of August of this year). Type the whole date for a different day, month and year. From the screenshot you can see that the user has access to the positions and people in one area but can see the structure.

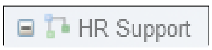


You will note that you can also see 3 charities in the structure – this is because we currently run the payroll for these – only Payroll have access to the information about the people in these.

The organisational structure uses a 'cliff faced approach' design, this allows HR and Payroll to use inheritance options on units, posts and positions throughout the structure – thus reducing the workload when creating new areas.



- The organisation



- A unit, often used to differentiate between areas

- A post, this is generally a job category and thus may have several (or just one) positions underneath it.

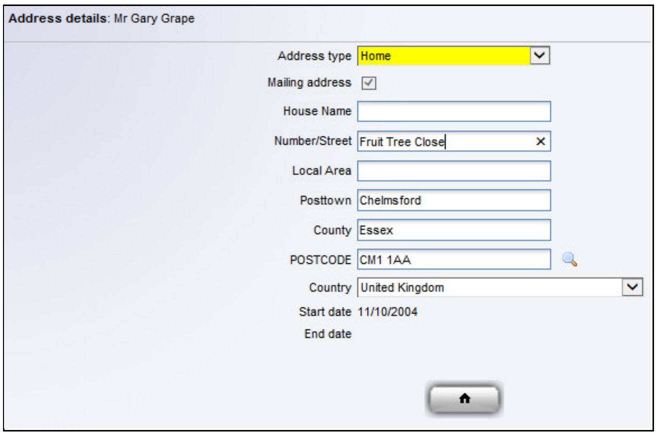
- A position, there will only ever be one person in a position at any one time.The chair is coloured blue if there is someone currently sitting in the position as of the effective date, it is coloured green if it is vacant and is coloured red if it is currently attached to a requisition (i.e.Recruitment campaign).

- A contract (usually a person), this will detail the person sitting in the position.

1.4. Employee Details

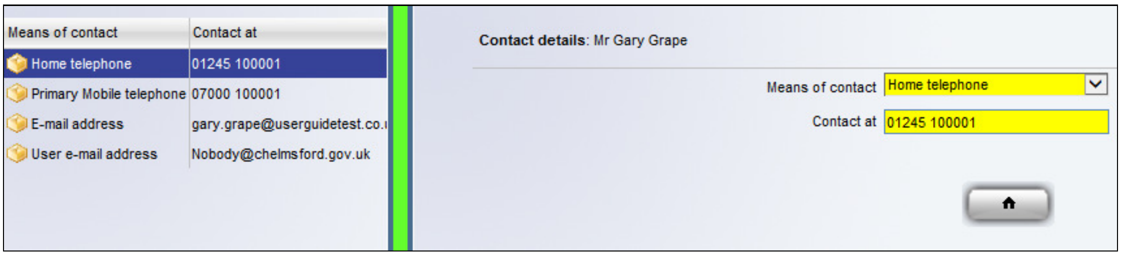
1.4.1. Employee Address

This link will look at an employee address detail, the system will ask for an effective date, the date entered WILL impact upon the address given (especially if the employee has changed their address in the past).



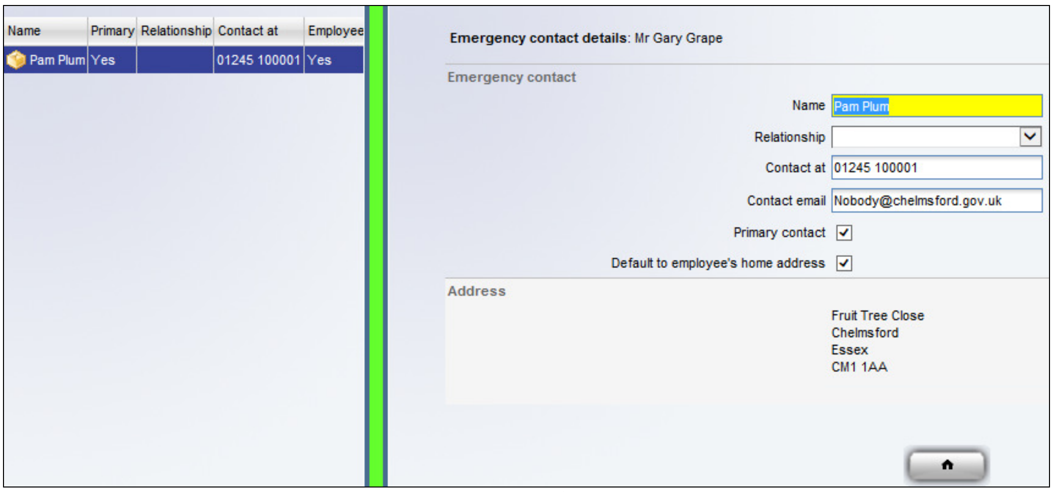
1.4.2. Employee Contact

Will list contact details for the employee that are held in the system. These contact details are not date effective.



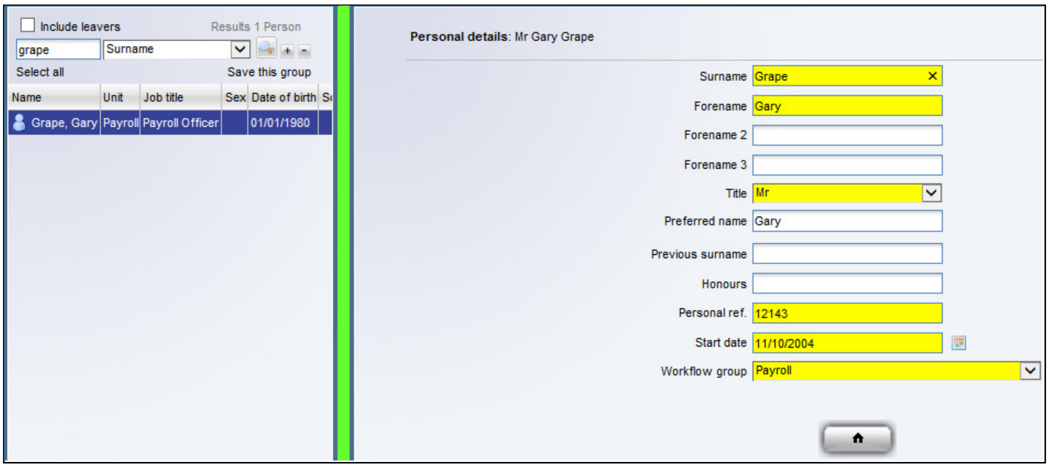
1.4.3. Employee Emergency Contact

Will detail employees emergency contact details, if they have more than one then this will be listed in the object pane.



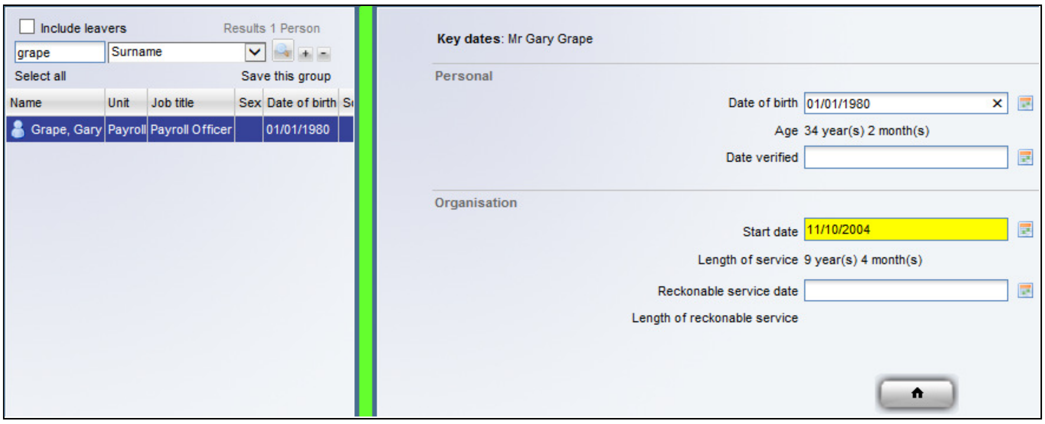
1.4.4. Employee Personal Details

This will contain personal details including full name and title and personal / payroll ref.



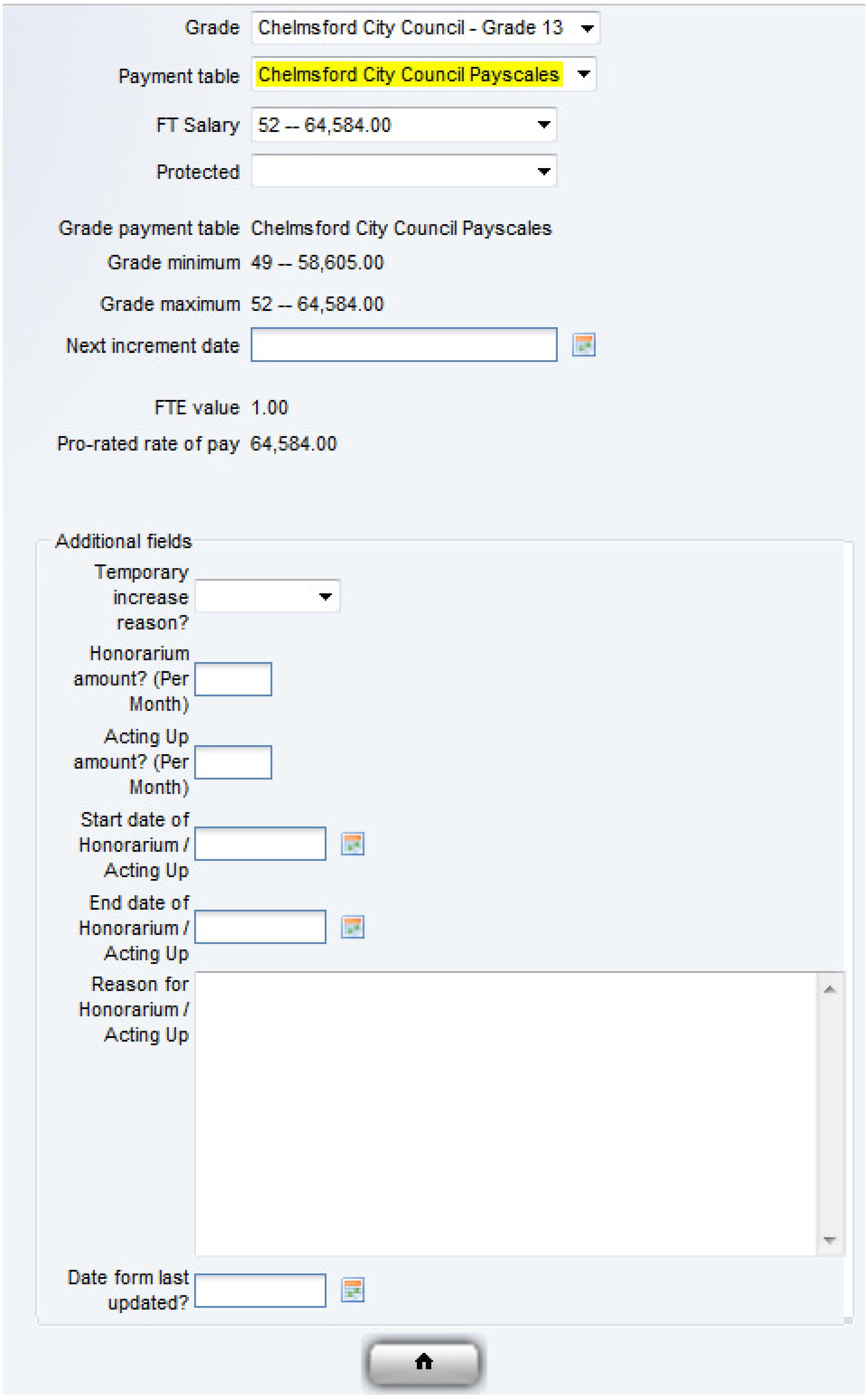
1.4.5. Employee Key Date Details

This will contain the employee's date of birth, organisation start date and reckonable service (if applicable).



1.4.6. Employee Grade (Person / Position)

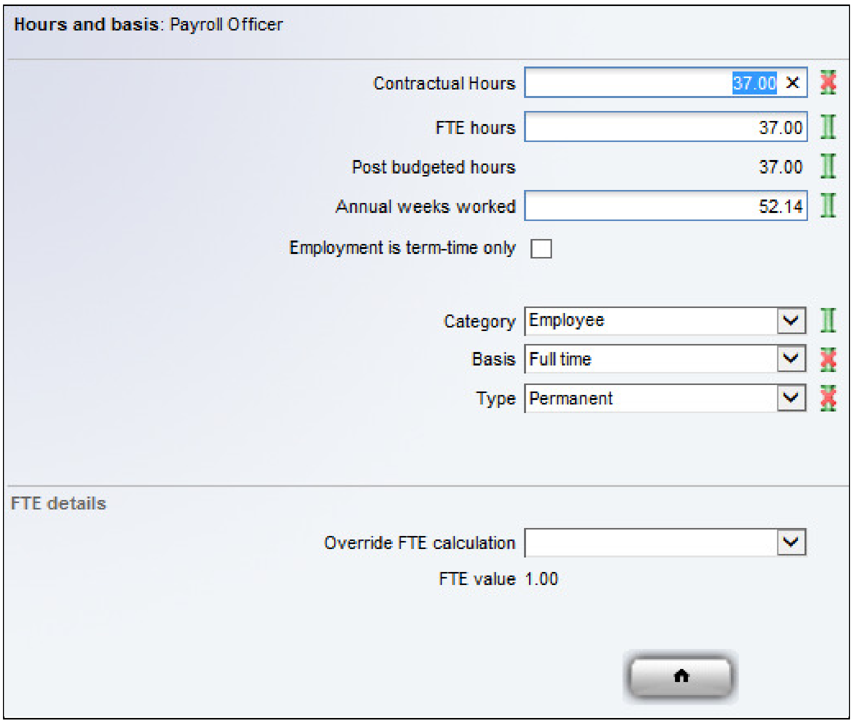
This link will take you to the screen that holds salary information, in iTrent this detail is stored against the position that the person is in (all links with 'Person / Position' after the name are links that are looking at occupied position information). The system will ask you for an effective date. The screen will detail the grade, the current salary (SCP), what SCP the employee is on if they are currently on protected pay, the min and max SCP amounts, the next date of increment increase, the FTE value and consequently the pro-rated amount based on the FTE.



The additional fields will show whether the person currently has an Acting up or Honorarium payment added to their salary. This will include the reason, the amount, and the start and end dates. The information in these fields cannot be amended in this screen and will only display acting up or honroriums that are currently in place, one off payements will not show as they will be paid through the payroll for the specific date required.

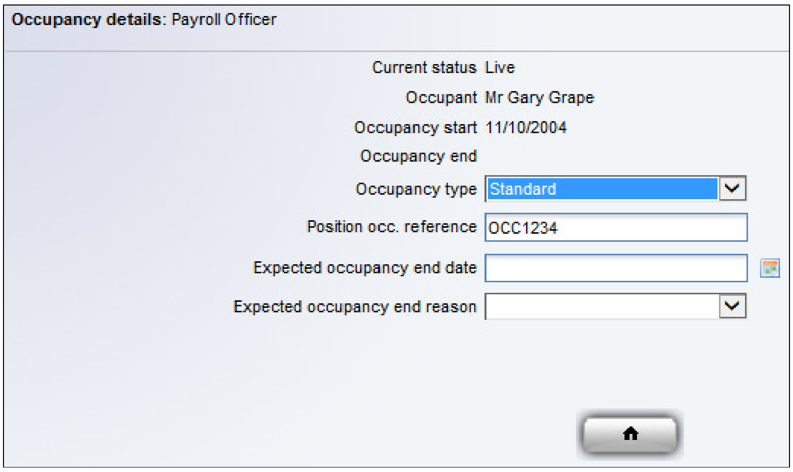
1.4.7. Employee Hours (Person / Position)

This link will be mostly used for looking at contractual hour information, it is date effective. The post budget hours can also be seen on this page; this details the amount of hours allocated against the post and is also used for reporting purposes on the establishment. (A post may have 74 hours, but this could be spread amongst two positions both doing 37 hours or potentially 10 positions all doing 7.4 hours)



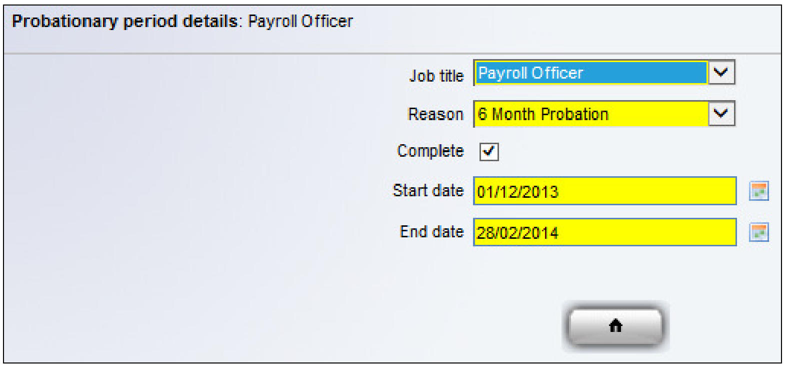
1.4.8. Employee Occupancy Type (Person / Position)

This screen will show you the expected occupancy end date where the employee maybe on a secondment / fixed term contract.



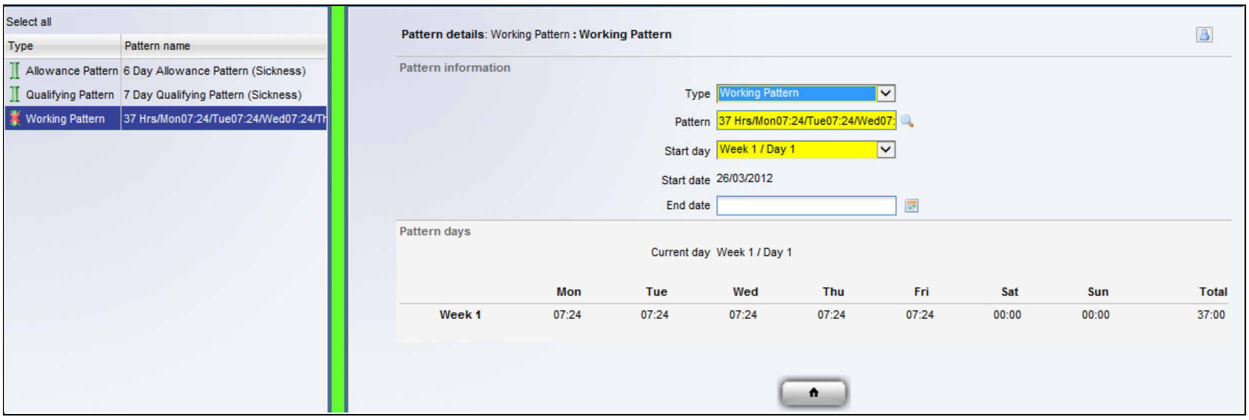
1.4.9. Employee Probationary Period (Person / Position)

Where applicable this will detail the 3 month and 6 month probation dates as well as confirmation if the probation has been completed.



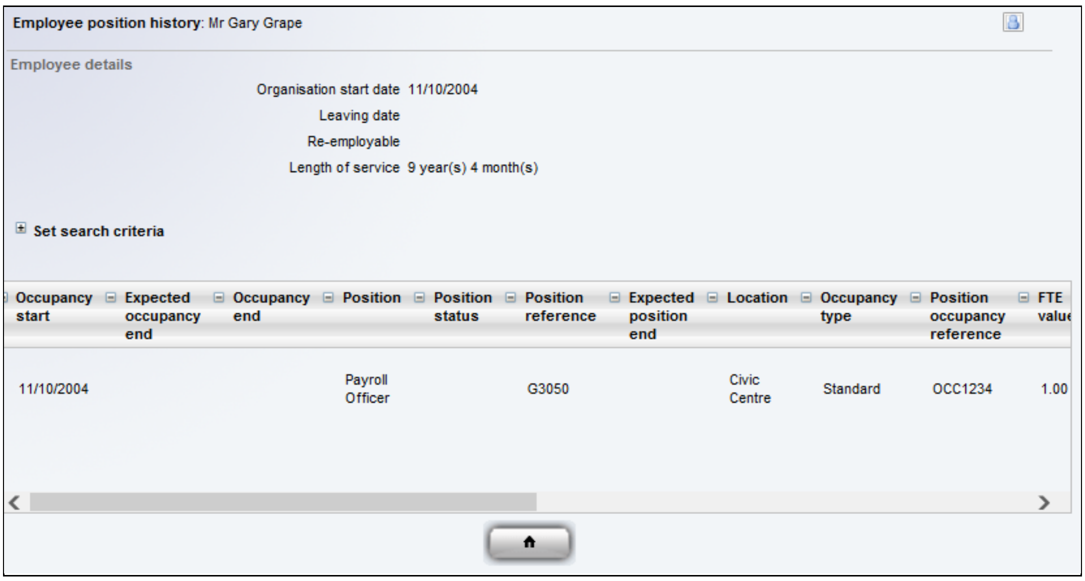
1.4.10. Employee Working Pattern (Person / Position)

This will detail the current working patterns attached to the person/position. Allowance and Qualifying patterns are used for calculating sickness through Payroll.



1.4.11. Employee Position History

This will detail all the positions an employee has been in (since the start of iTrent in April 2012).



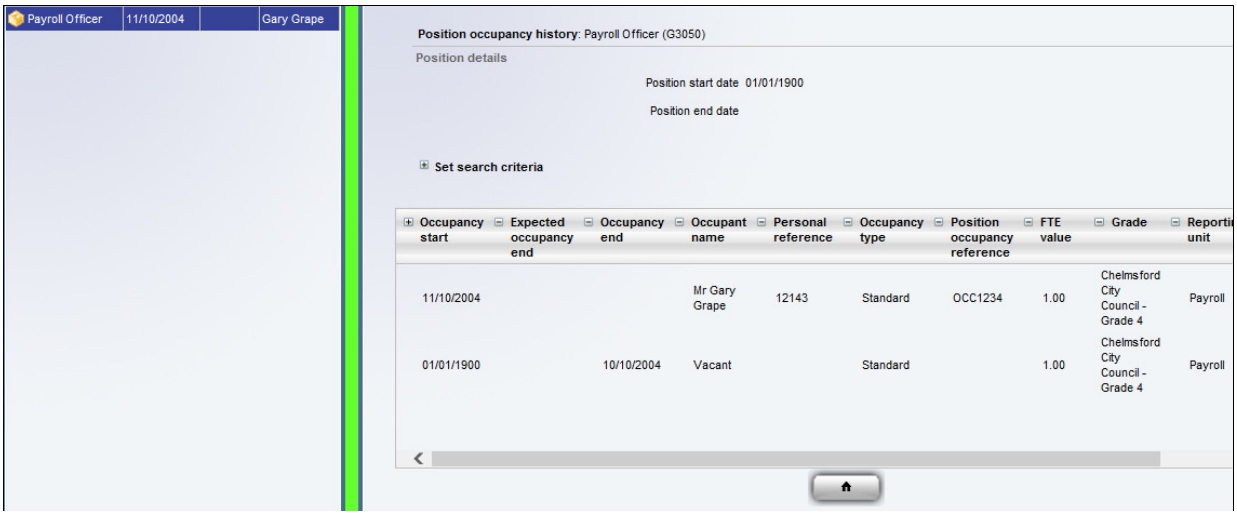
1.5. Position Details

1.5.1. Position Grade / Position Hours

These will both look at the same screen as the Employee Position Grade and Employee Position Hours see section 1.4.6, however the search is done by position and not person which enables the user to also look at positions in their structure that are currently vacant.

1.5.2. Position Occupancy History

This is similar to the employee position history but is actually looking at the history of the position. I.e. tell me everyone who has been in this job. Using this on a vacant position for example will tell you who the last occupant was. (Position history is only kept from April 2012).

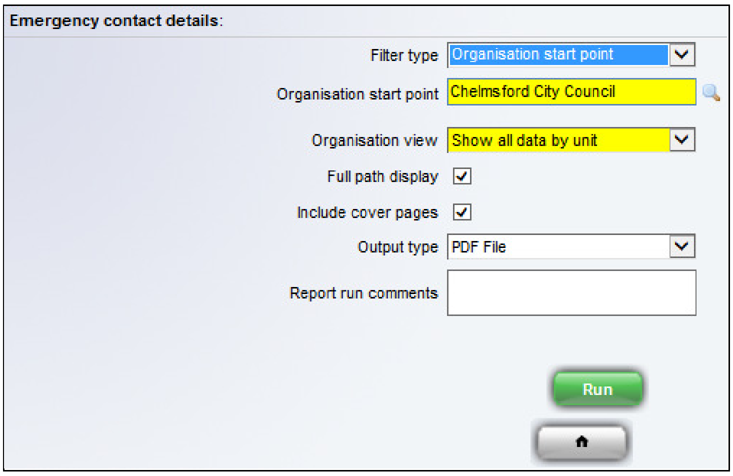


1.6. Standard Reports

'People' and 'Download People Reports' will give you information on your reporting area, Once the link is clicked a list of available reports is given in the object pane. Once the required report is clicked the run options are listed in the display pane. Many of the reports will be done as a background process and you will be notified once they have been completed.

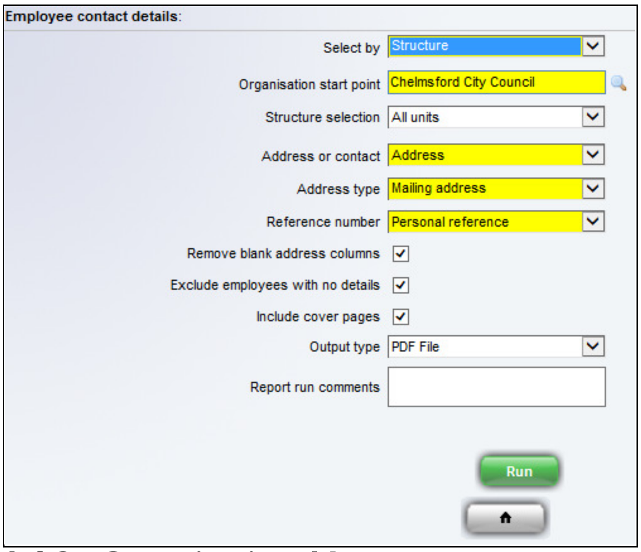
1.6.1. Emergency Contact Details

This will simply give emergency contact details for the group of people required. If you are a manager who looks after multiple units then you can select a sub unit if required. Leaving the organisation start point as Chelmsford City Council will give you all matches that you are allowed to have access to. This can be output as pdf or CSV (can be opened in excel).



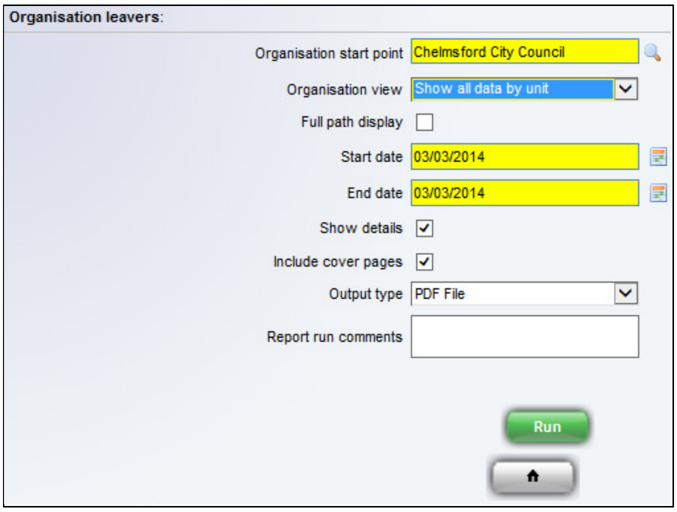
1.6.2. Employee Contact Details

This will simply give you all the employee contact details required for the group of peoplethat you have access to. (This may be useful to supplement your business continuity plan!) This report gives you the option of address information or contact information. Output again is via pdf or CSV.



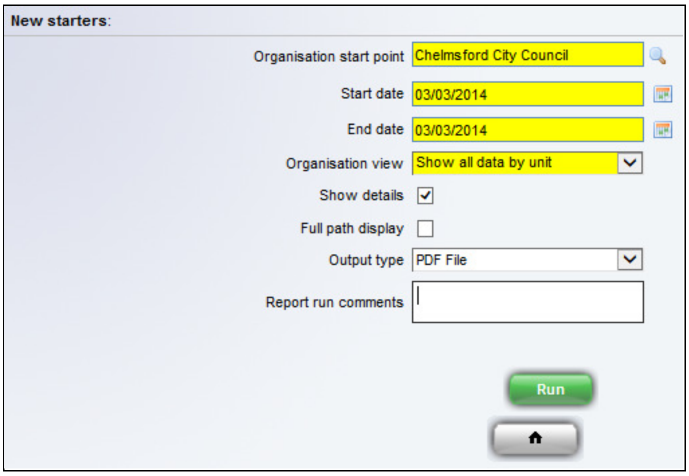
1.6.3. Organisational Leavers

This will simply give all the leavers that you have access to within a particular leaver period. It should be noted that the People Manager access will allow you to report back 366 days only. Leaver reports required further than this can be obtained from HR.



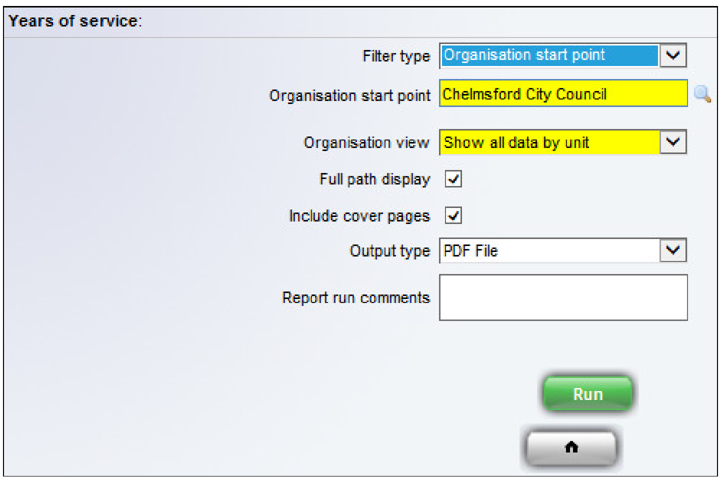
1.6.4. New Starters

Similar to the leavers report this will give all new starters in a period.



1.6.5. Years of Service

This report will show all staff that you have access to and list their gender, start date, position, age and length of service.

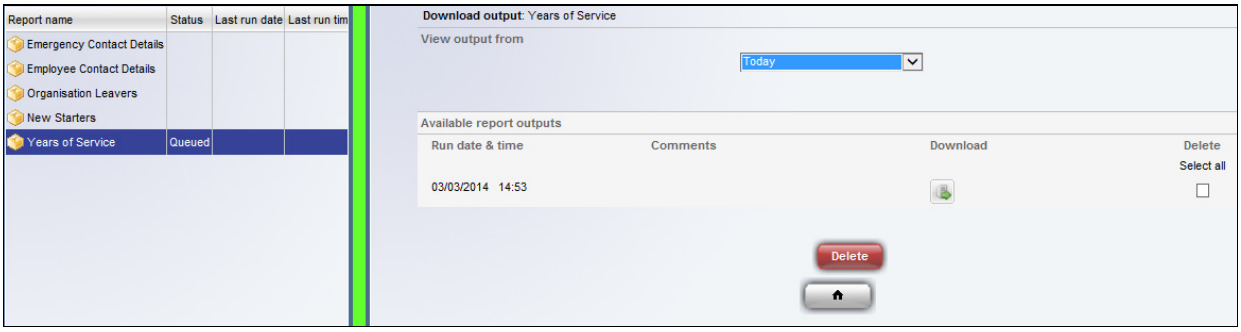


1.6.6. Downloading Reports

The reports that have been run and completed will show in the process area of your home page.

Running Reports are indicated in green. Completed reports will change to black font and will contain a hyperlink to the download reports area when you hover over the title. (Alternatively use the link on the People Manager tab that states download reports and then click on the report type that you know has been run and completed).

When in the download output area you will see the following screen, click on the download button to download / open the document as required.

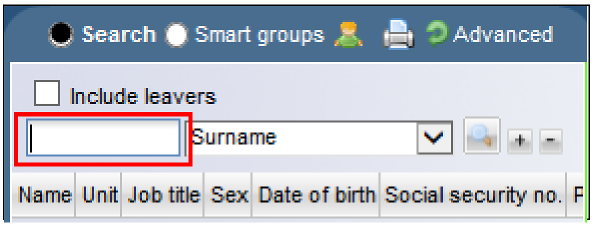


2. People Manager – Absence Tab

2.1. Personal Holiday absence details

2.1.1. Input New – Holiday absence

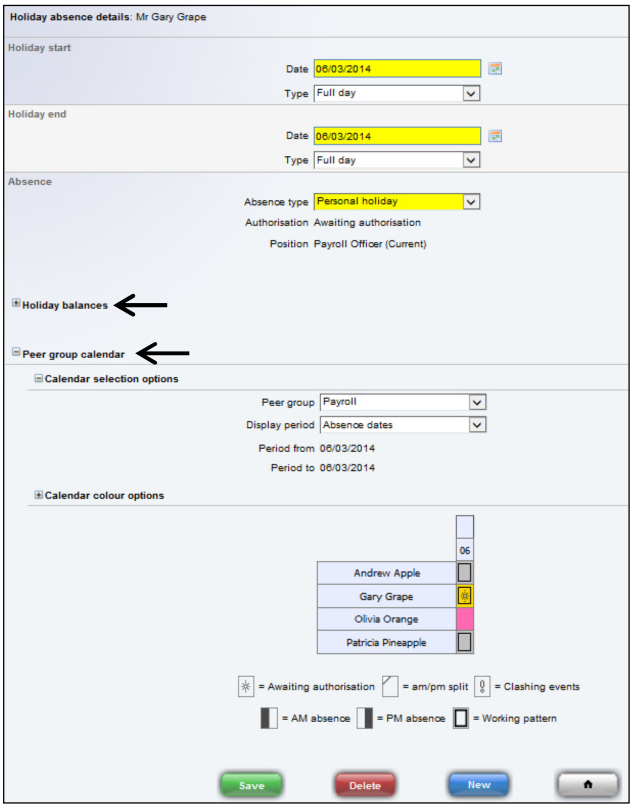
To add new holiday dates for a member of your staff click the Input New – Holiday absence link. You will be prompted for the staff member's surname.



(Type in the surname and click search .

Fill in the absence details and click 'Save' (this will automatically authorise the leave). Email confirmation of the holiday absence will be sent to you and your staff member if they have a Council email address (see Appendix A). If not they can login into Employee Self Service to check their holiday dates.

The holiday absence screen will also show the person's holiday balances and if applicable a peer group calendar (if the employee is part of any peer groups). Employees who are in more than one peer group will have a drop down list of peer groups so that the appropriate peer group can be checked.

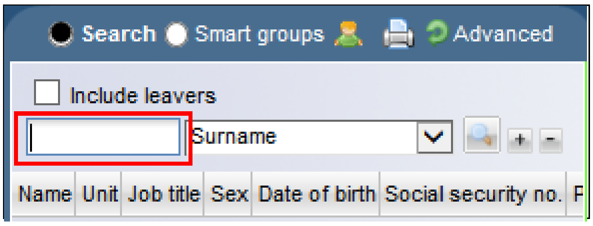


The Holiday type can be Full day, Half Day – AM or Half Day - PM.

The Holiday end date can also have Full day or Half Day specified. It should be noted that part day looks at half of the persons normal working day of the given day, thus a part timer who is taking the day off when they only work mornings would actually need to have this put through as a full day. Ie. if they work 4 hours and part day is processed it will only subtract 2 hours from their balance.

2.1.2. View / Amend – Holiday absence

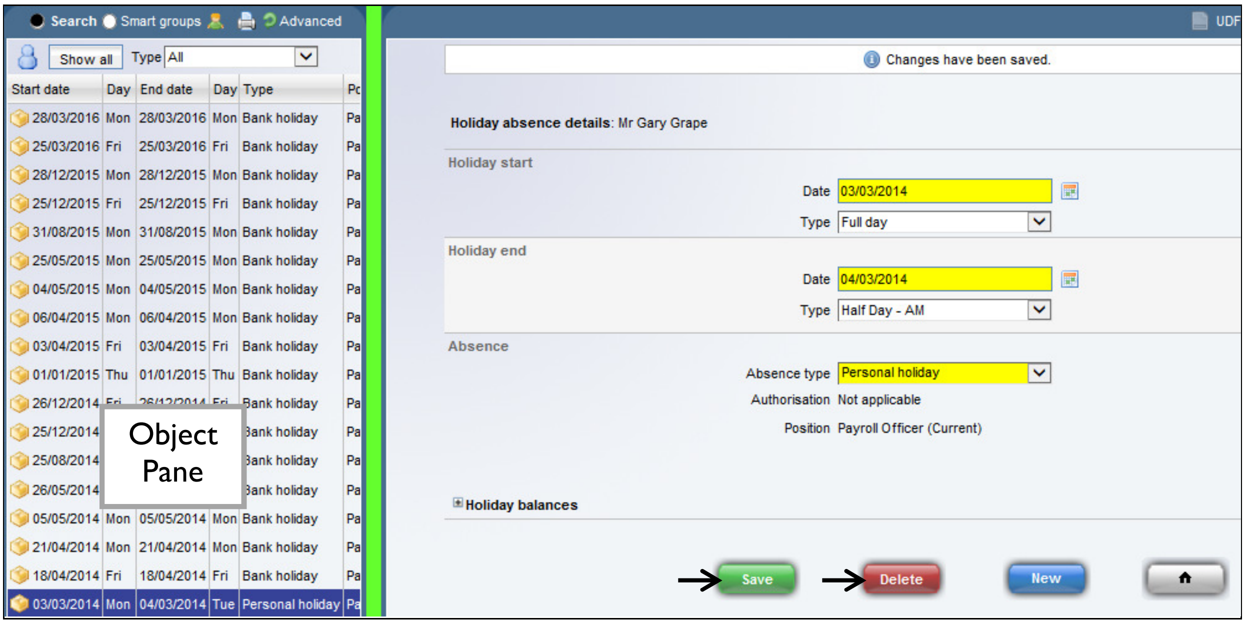
To view or amend a staff member's holiday absence simple click on View / Amend – Holiday absence link. You will be prompted for the staff member's surname.



(Type in the surname and click search .

To change an absence first select the required absence from the Object Pane, change the date(s) or type(s) and click 'Save'. Email confirmation of the amended absence will be sent to you and your staff member if they have a Council email address (see Appendix B). If not they can login into Employee Self Service to check their holiday dates.

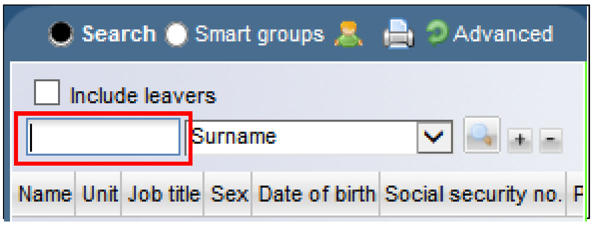
To delete an absence first select the required absence from the Object Pane and simply click 'Delete'. Currently there is no email confirmation on deleting holiday absences so please make your staff member aware that you have deleted an absence.



You can also add new holiday absences from the View / Amend – Holiday absence screen by selecting 'New'.

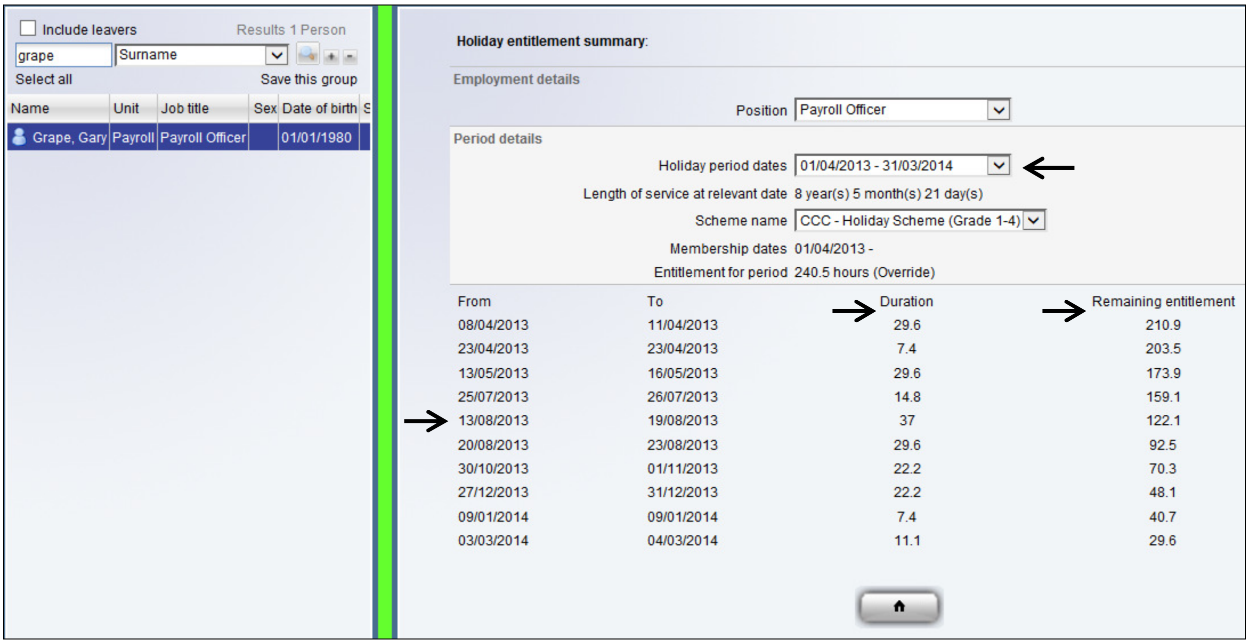
2.1.3. View - Holiday entitlement

To view a staff members holiday entitlement simple click the View - Holiday entitlement link. You will be prompted for the staff member's surname.



(Type in the surname and click search .

The staff member's holiday entitlement summary details page will be displayed.



From this screen you can see all absence dates that have been requested the duration of each absence in hours and how much holiday the staff member has remaining.

You can also select the next financial year's holiday entitlement by selecting for the drop down menu within period details under Holiday period dates .

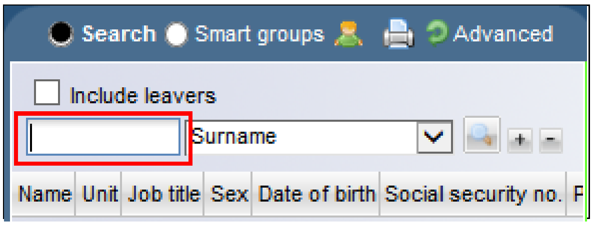
If the employee has more than one position you can simple select the other position from the drop down menu under Employment details .

TIP you can simple check another employee's entitlement by changing the surname in the search box and clicking the search icon rather than going through all the screens again.

N.B. If the Duration of each absence in hours does not match the expected duration, or shows up as zero hours, this means that the employee's working pattern is not configured correctly. This will cause the holiday entitlement calculation to be off, so please speak to HR about it.

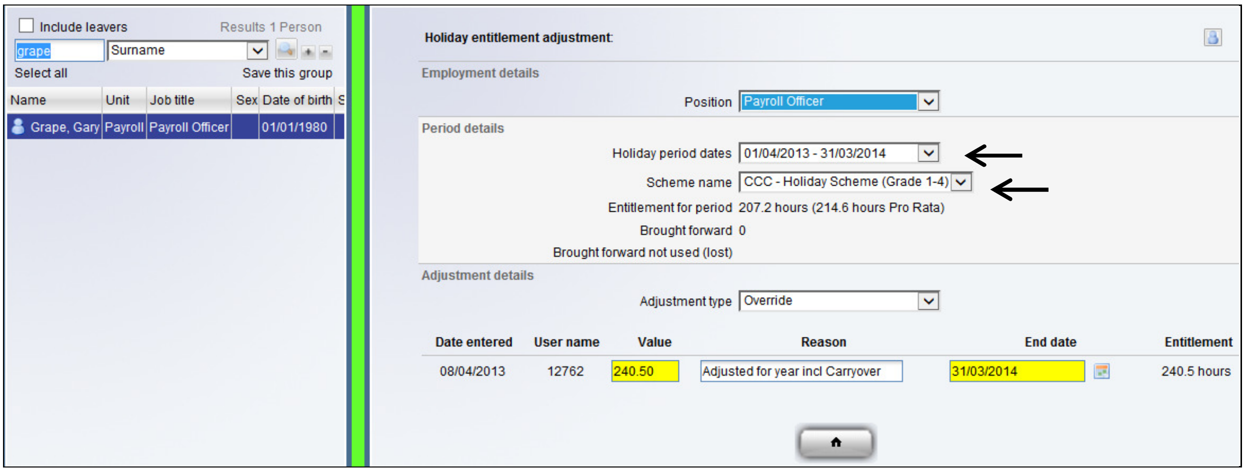
2.1.4. View – Holiday adjustment

To view if a staff member has had a holiday adjustment simple click the View - Holiday adjustment link. You will be prompted for the staff member's surname.



(Type in the surname and click search .

The staff member's holiday entitlement adjustment screen will be displayed.



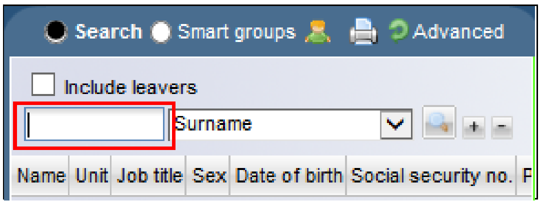
From this screen you can see the date the adjustment was added, who by (user name) and the reason for the adjustment.

You can also select the next financial year's holiday entitlement adjustment by selecting for the drop down menu within period details under Holiday period dates .

If the employee has more than one position you can simple select the other position from the drop down menu under Employment details .

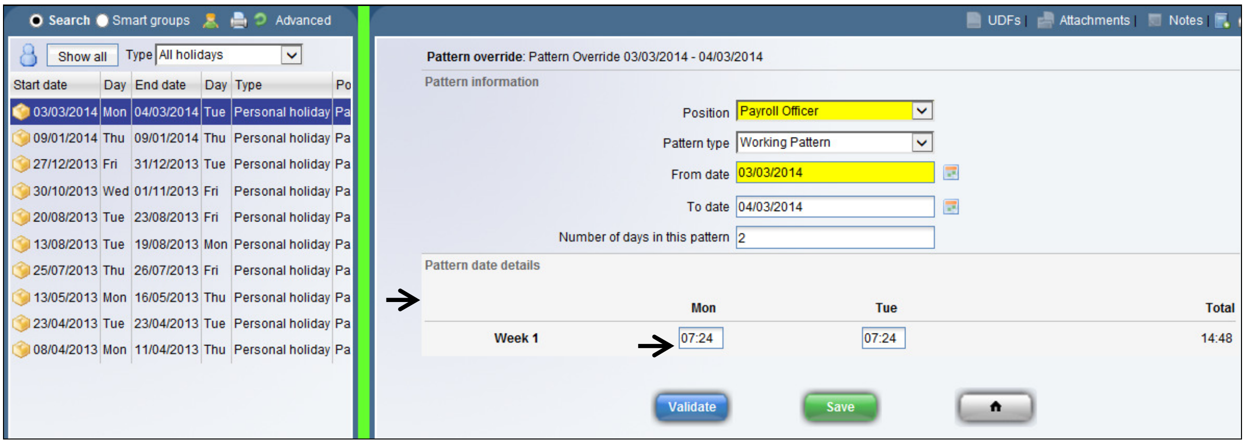
2.1.5. Input New – Pattern override for holiday absence

If you need to change the working pattern relating to a holiday absence you will need to click the Input New – Pattern override for holiday absence link. You will be prompted for the staff member's surname.



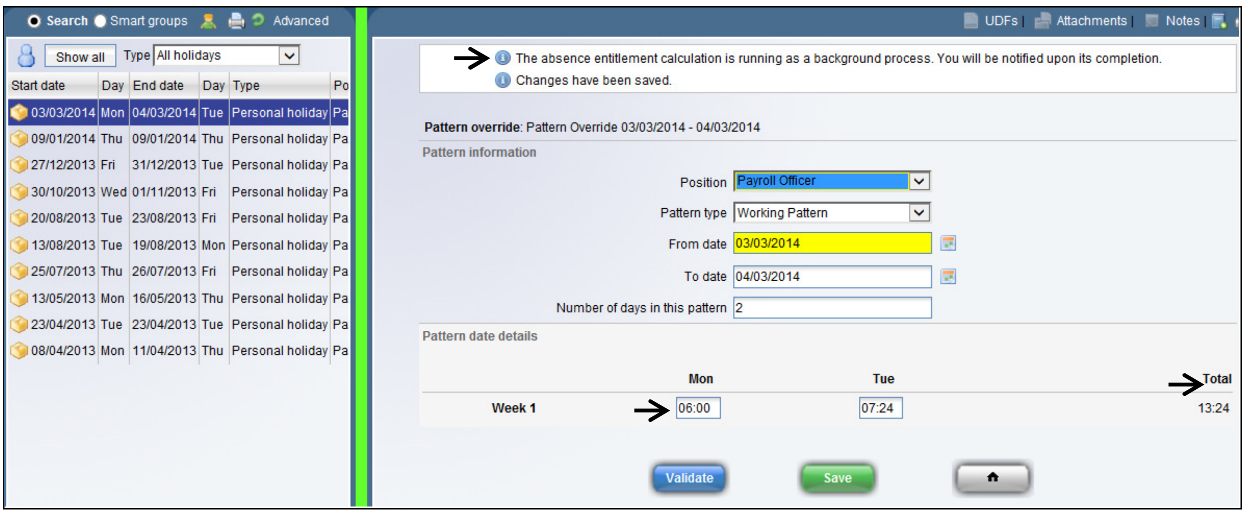
(Type in the surname and click search .

The staff member's working pattern override screen will be displayed.



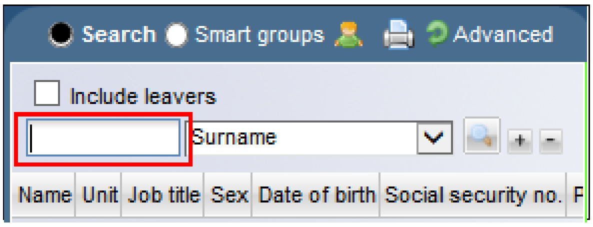
The pattern information will display the staff member's position, pattern type (always working pattern), from and to dates of the absence, number of days in the pattern relating to the absence and details of the number of hours in the absence pattern.

To change the member of staff's hours for a particular day within the absence simply click the day field under Pattern date details and type in the new hours. Clicking 'Validate' will validate the hours into a correct data format e.g. if you typed in 600 (for 6 hours) the validate button will change it to 06:00. When all changes have been made click 'Save', the system will re-calculate the absence as a background process. Please note that this works in hours and minutes. The changes you have just made will be reflected in the Total.



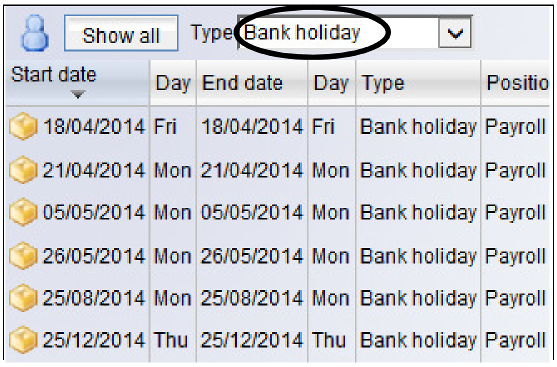
2.1.6. View / Amend – Bank holiday taken

To view or amend a staff member's bank holiday to show as 'not taken' simple click on View / Amend – Bank holiday taken link. You will be prompted for the staff member's surname.



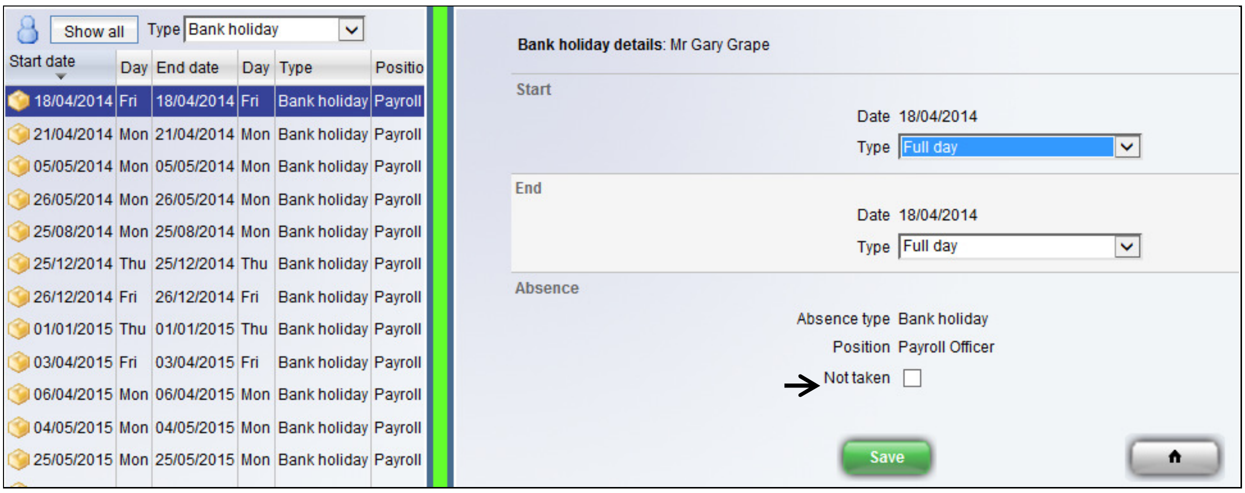
(Type in the surname and click search .

Change the Type in the Object Pane to 'Bank holiday' using the drop down menu .



A list of bank holidays will be displayed.

To mark a bank holiday as 'not taken' first select the required date from the Object Pane. This will display the bank holiday details for the date chosen.



You will need to tick the box ' Not taken' and click 'Save'. You can repeat this for each bank holiday that needs to changed.

The hours deducted from the system will now be credited back to the staff member's holiday entitlement (see 2.1.3).

If a member of staff has the bank holiday set as 'Not taken' and they then taken the bank holiday then the reverse of above is applicable. Ie. Go in and untick the box and save. Unticking the box

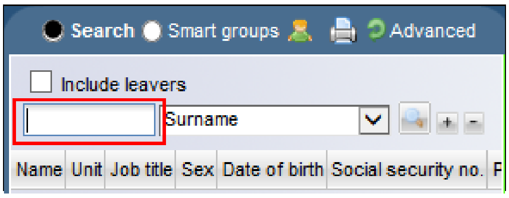
will mean that the persons usual working day for that particular day will be taken from their holiday entitlement.

NB: If you are adding the bank holiday in as above, ensure that the member of staff has appropriate holiday balance left in the system. Members of staff on fixed term contracts should normally have bank holidays past their expected end date set as ‘Not taken’ to avoid the bank holidays being taken from their leave entitlement however if their contract is extended then these would need to be added back in (as appropriate).

2.2. Other absence details

2.2.1. Input New – Other absence

To add new other absences apart from personal holiday and sickness for a member of your staff simple click the Input New – Other absence link. You will be prompted for the staff member’s surname.

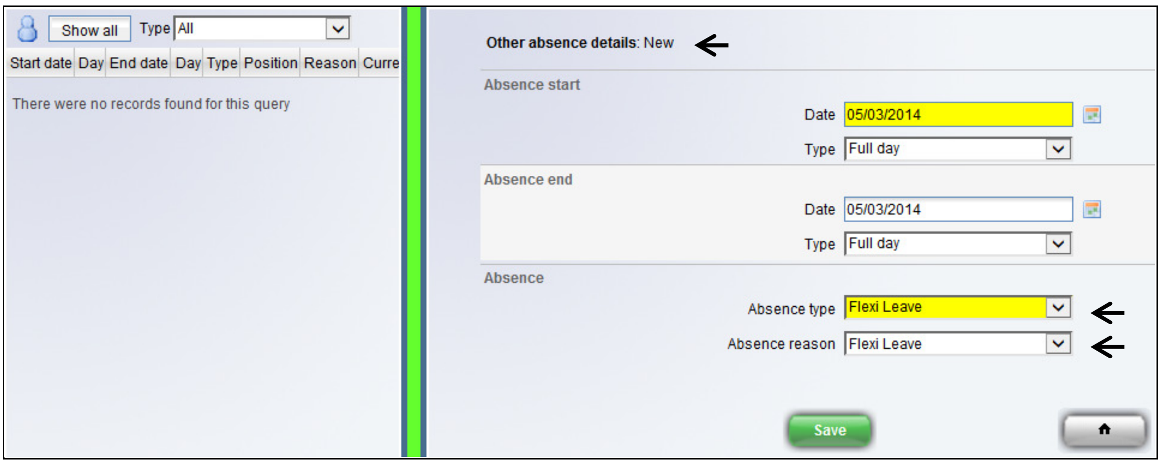


(Type in the surname and click search .

The staff member’s ‘Other absence details: New’ screen will be displayed.

Fill in ‘Absence start’ and ‘Absence end’ date and the ‘Type’ (Full day, Half Day – AM or Half Day – PM).

Using the drop down menu under ‘Absence type’ and ‘Absence reason’ select the absence you require.



Once all details have been entered click ‘Save’ to save the absence.

Email confirmation will be sent to you and your staff member if they have a Council email address (see Appendix C). If not they can login into Employee Self Service to check their holiday dates.

NB: A ‘Flexi’ period is one calendar month, if you receive a second absence request for ‘Flexi Leave’ which falls within the same flexi period authorisation will be needed from the Director in line with the Flexible Working Hours Policy.

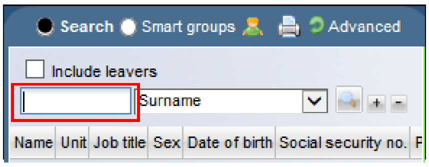
Types of ‘Other’ absences:

Bereavement Leave	Input only by People Manager	Not authorised
Carers Leave	Input only by People Manager	Not authorised
Compassionate Leave	Input only by People Manager	Not authorised
Election Duties	Can be Input by Staff or People Manager	Not authorised
External Meeting	Can be Input by Staff or People Manager	Not authorised
External Training	Can be Input by Staff or People Manager	Not authorised
Flexi Leave	Can be Input by Staff or People Manager	Authorised
Industrial Action	Input only by People Manager	Not authorised
Parental Leave	Input only by People Manager	Not authorised
Public Duties	Input only by People Manager	Not authorised
Study Leave	Can be Input by Staff or People Manager	Authorised
Union Duties	Can be Input by Staff or People Manager	Not authorised
Unpaid Leave	Input only by People Manager	Not authorised

If you enter a ‘Flexi Leave’ or ‘Study Leave’ request this will be automatically authorised by the system.

2.2.2. View / Amend – Other absence

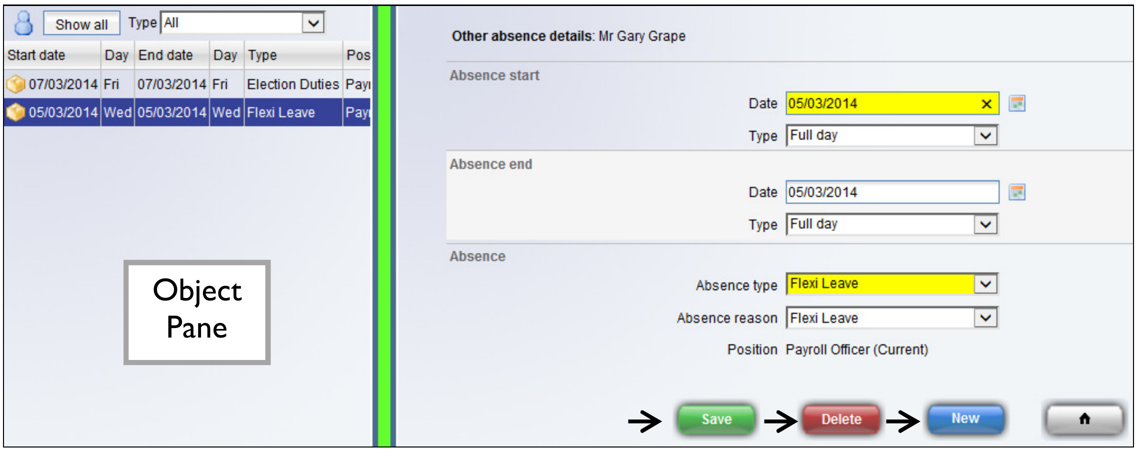
To view or amend a staff member’s other absences simple click on View / Amend – Other absence link. You will be prompted for the staff member’s surname.



(Type in the surname and click search .

To change an absence first select the required absence from the Object Pane, change the date(s) or type(s) and click ‘Save’. Email confirmation of the amended absence will be sent to you and your staff member if they have a Council email address (see Appendix D). If not they can login into Employee Self Service to check their holiday dates.

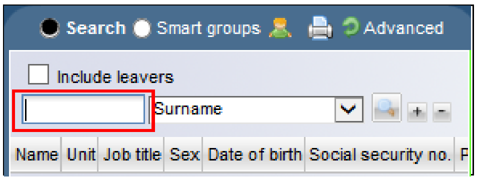
To delete an absence first select the required absence from the Object Pane and simple click ‘Delete’. Currently there is no email confirmation on deleting other absences so please make your staff member aware that you have deleted an absence.



You can also add new other absences from the View / Amend – Other absence screen by selecting 'New'.

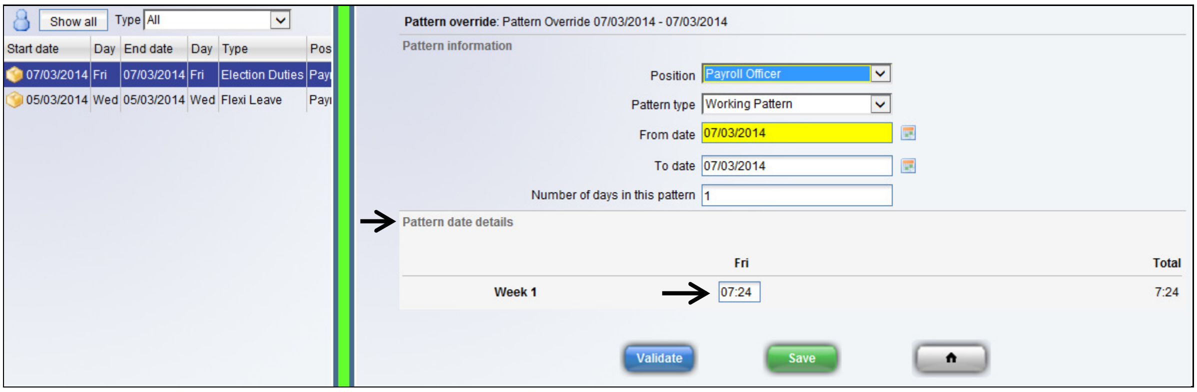
2.2.3. Input New – Pattern override for other absence

If you need to change the working pattern relating to other absence you will need to click the Input New – Pattern override for other absence link. You will be prompted for the staff member's surname.



(Type in the surname and click search .

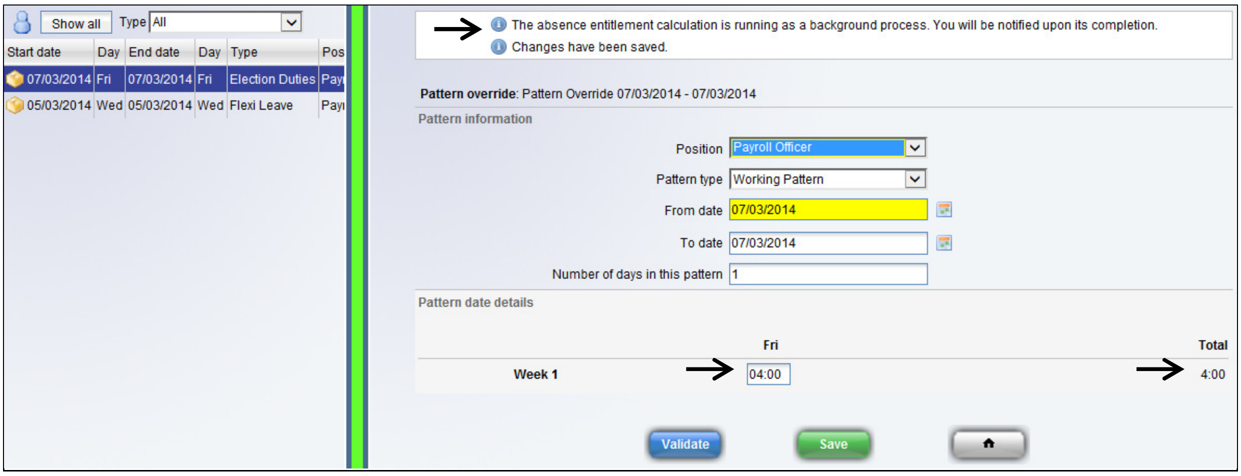
The staff member's working pattern override screen will be displayed.



The pattern information will display the staff member's position, pattern type (always working pattern), from and to dates of the absence, number of days in the pattern relating to the absence and details of the number of hours in the absence pattern.

To change the member of staff's hours for a particular day within the absence simply click the day field under Pattern date details and type in the new hours. Clicking 'Validate' will validate the hours into a correct data format e.g. if you typed in 600 (for 6 hours) the validate button will change it to 06:00. When all changes have been made click 'Save', the system will re-calculate the

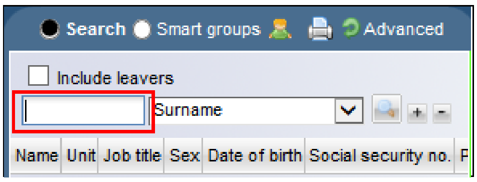
absence as a background process. These need to be input in hours and minutes. The changes you have just made will be reflected in the Total.



2.3. Maternity / Paternity absence details

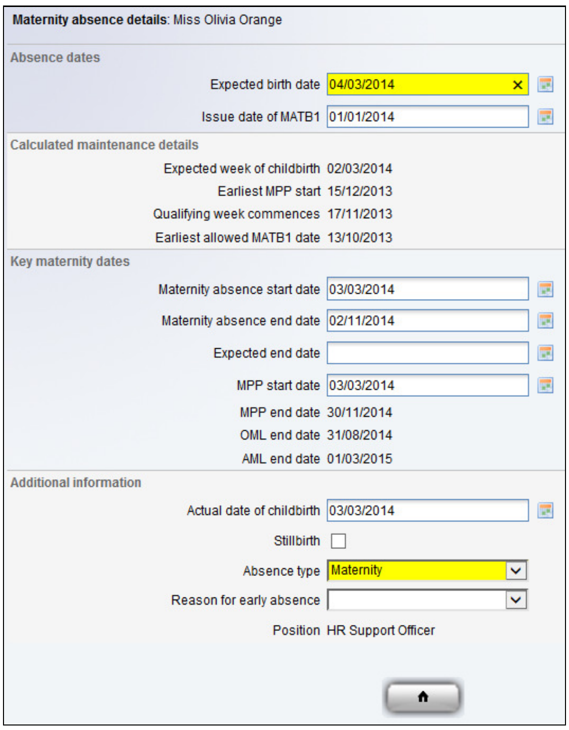
You will only be able to view a staff member's maternity, paternity and adoption absence that has been input by the Payroll team.

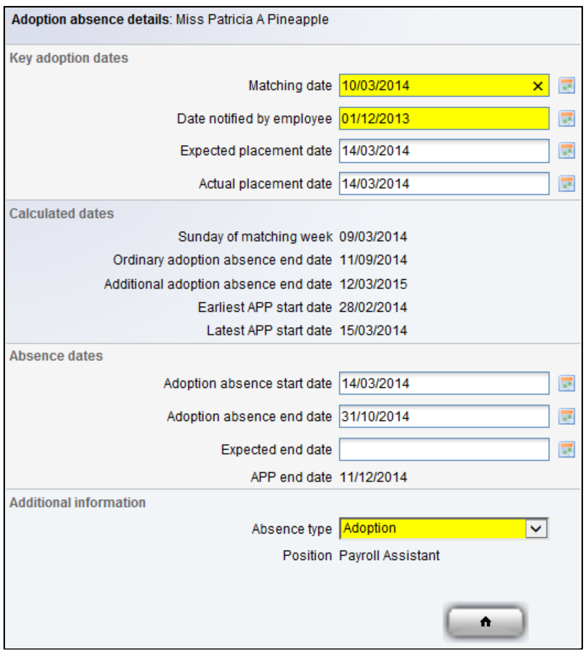
To view the absence details click on one of the links under 'Maternity / Paternity absence details'. You will be prompted for the staff member's surname.



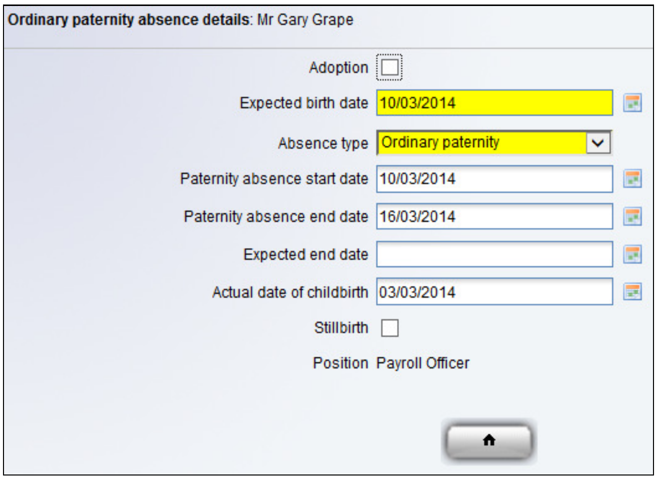
(Type in the surname and click search .

Example of the Maternity absence screen *Example of the Adoption absence screen*





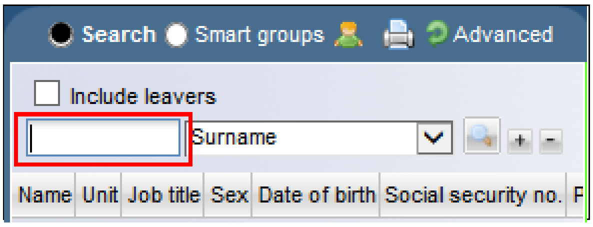
Example of the Paternity absence screen



2.4. Sickness absence details

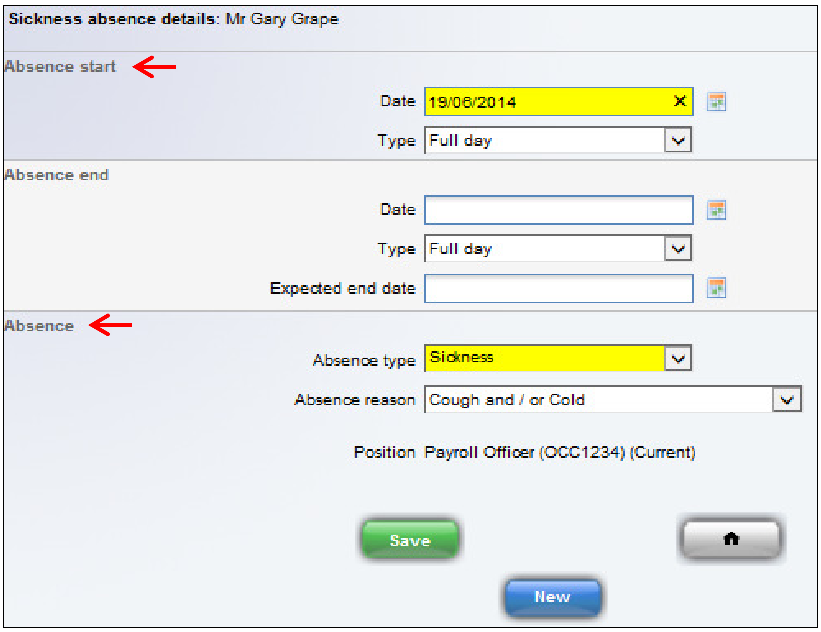
2.4.1. Input New – Sickness Absence details

To add a new sickness absence for a member of your staff click the Input New – Sickness absence link. You will be prompted for the staff member's surname.



(Type in the surname and click search .

The staff member's 'Sickness absence details: New' screen will be displayed:



Fill in the ‘Absence start’ date and the type (Full day, Half Day – AM or Half Day – PM). Using the drop down menus under ‘Absence’ select the ‘Absence type’ which will always be ‘Sickness’, once selected you can then choose an ‘Absence reason’ for that absence.

Once all details have been entered click ‘Save’ to save the absence.

If the sickness absence overlaps with any holiday or flexi day, you won’t be able to save the absence until the holiday absence is cancelled:

This absence overlaps with the following existing absence(s): 04/07/2014 - 04/07/2014 (Flexi Leave)

Note: *When no end date is known, iTrent will show you that the sickness overlaps with all future absences:*

This absence overlaps with the following existing absence(s): 29/08/2014 - 29/08/2014 (Flexi Leave) 05/08/2014 - 08/08/2014 (Personal holiday) 18/08/2014 - 22/08/2014 (Personal holiday) 26/08/2014 - 28/08/2014 (Personal holiday) 29/12/2014 - 30/12/2014 (Personal holiday)

Changes have been saved.

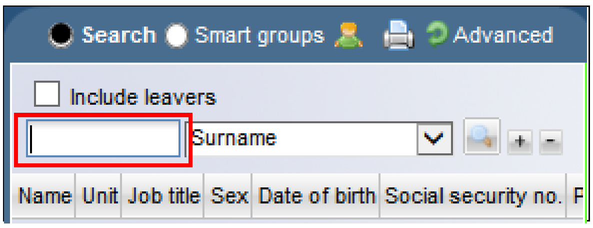
Email confirmation will be sent to the manager or administrator (see Appendix E). If the absence reason is ‘Potential industrial injury’ then a further notification will be sent to HR and Health & Safety.

To update the sickness absence with an end date see section 2.4.2 below.

Note: *When the employee returns to work they can go into Employee Self Service and input an end date. The manager or administrator will receive a confirmation email of the end date and a link to the ‘Return to Work’ form that needs to be completed.*

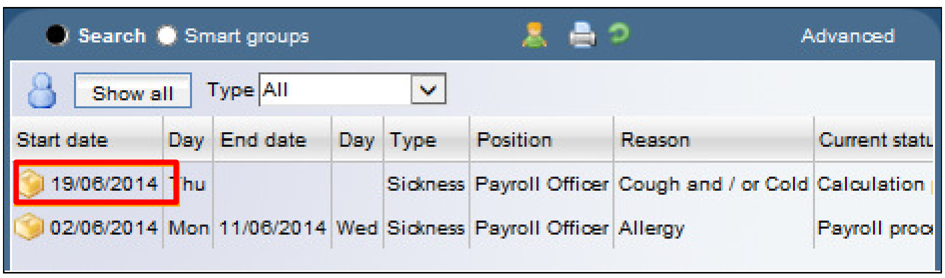
2.4.2. View / Amend – Sickness absence

To amend or update a sickness absence for a member of your staff click the View/Amend – Sickness absence link. You will be prompted for the staff member’s surname.

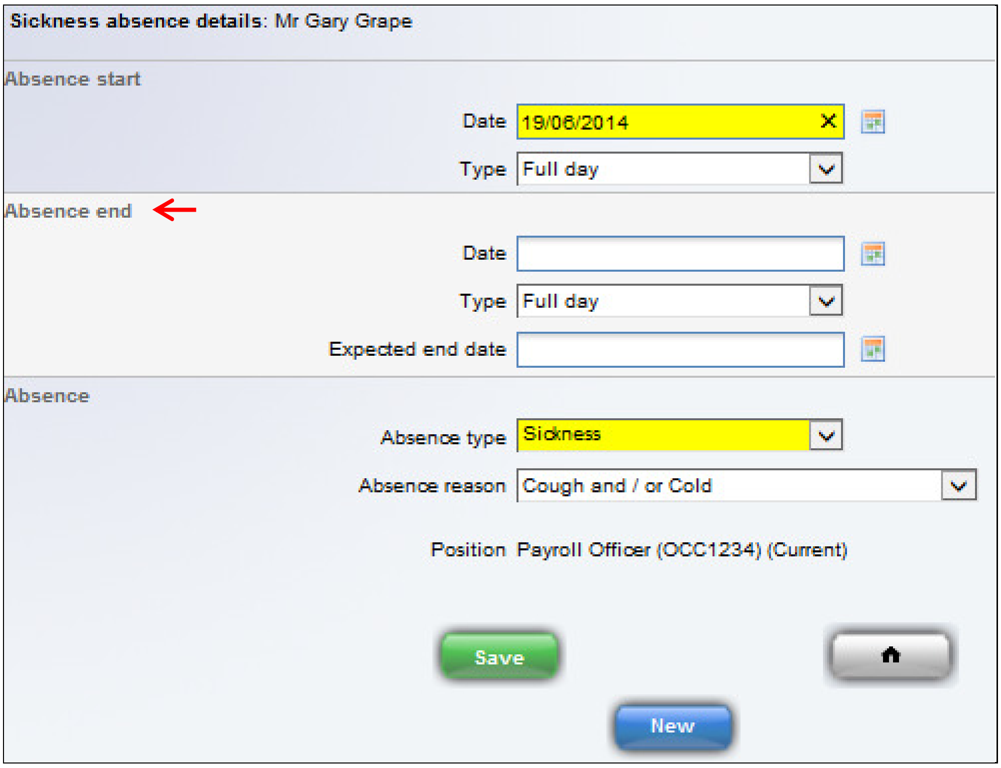


Type in the surname and click search .

From the Object pane select the absence you wish to update.



The staff member’s ‘Sickness absence details screen will be displayed.

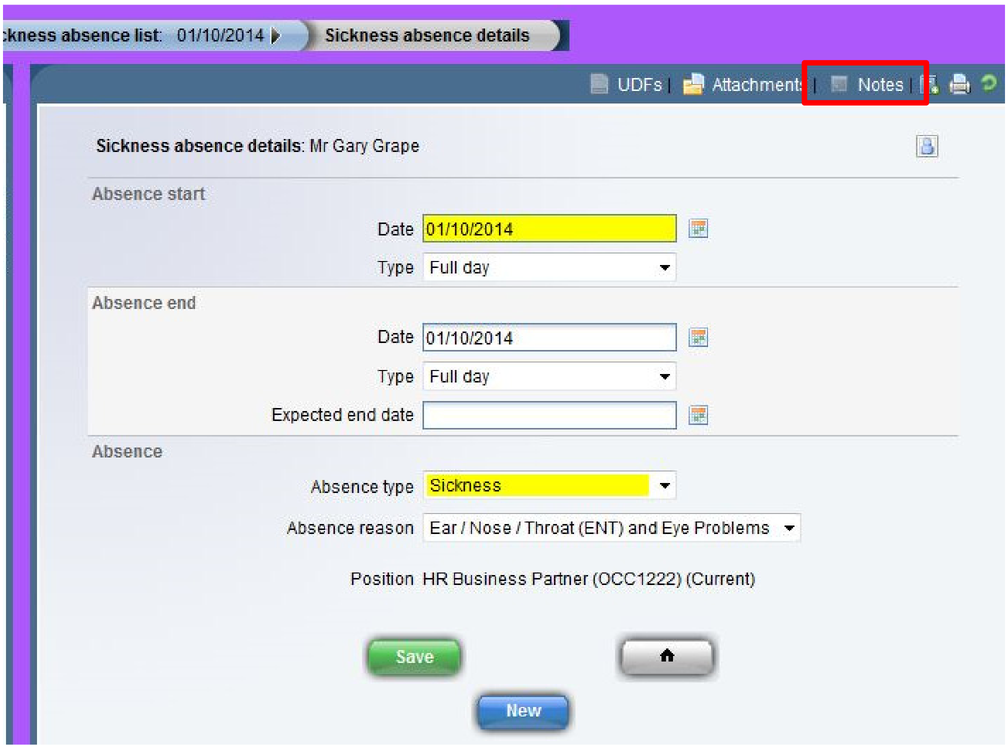


Fill in the ‘Absence end’ date (the last day of sickness) and the type (Full day, Half Day – AM or Half Day – PM). You can also amend the absence reason if needed by selecting a new reason from the ‘Absence reason’ drop down menu .

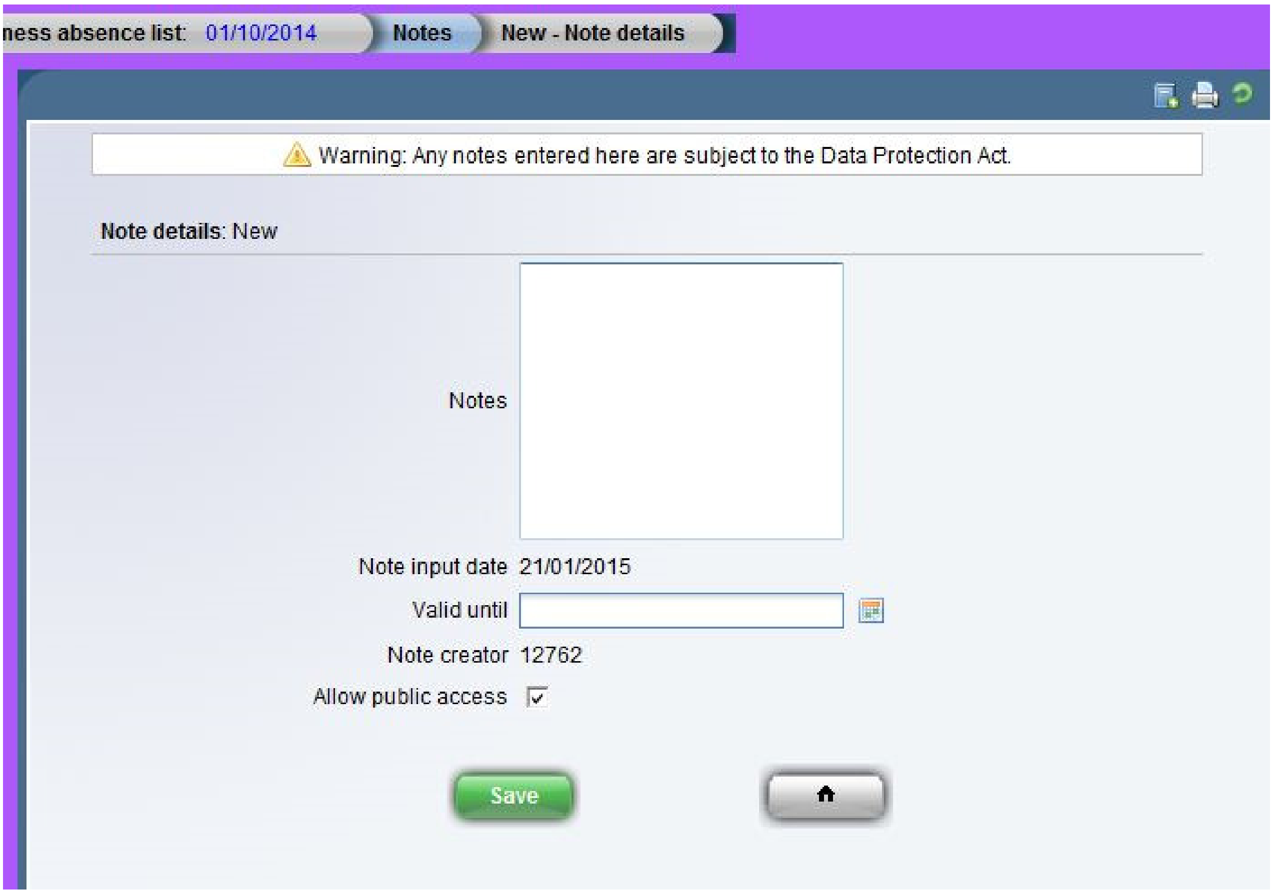
Note: Expected end date could be used if an employee is on long term sick.

Email confirmation will be sent to the manager or administrator (see Appendix F). If you have changed the absence reason you will also receive an email confirmation of that change (see Appendix G).

If you wish to add a note to the Sickness Absence, for example because you had an update from the employee, you can do so by clicking on the ‘Notes’ button. Employees are not able to see these notes.



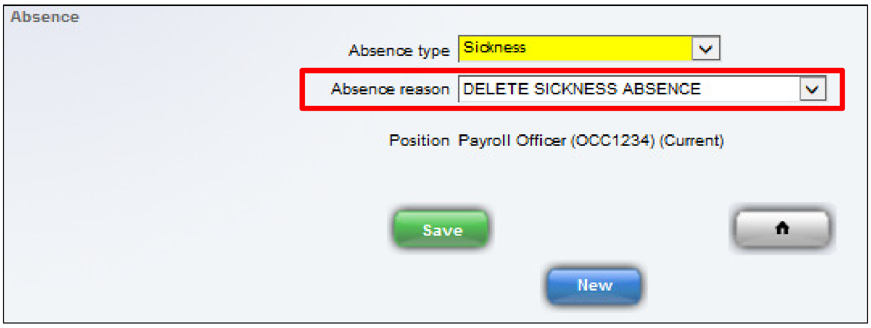
This will bring up the Notes screen which allows you to put in a note. By using the 'Valid until' field the note will be automatically removed in future, but it is not necessary to put this in. If you leave the 'Allow public access' box ticked, this means other people who have access to employee records will be able to see it (such as HR and Payroll). If you untick this box, only you can see the note. Press 'Save' to save the note. It will be stored against the Sickness Absence.



2.4.3. Deleting a Sickness Absence

If you have entered a sickness absence into iTrent against the wrong employee or the absence was not sickness then simple follow the steps from section 2.4.2 to locate the absence that you wish to delete.

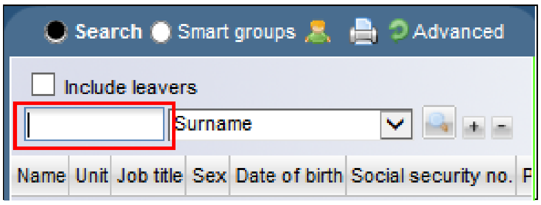
Simply select 'DELETE SICKNESS ABSENCE' from the absence reason drop down menu and click 'Save'. This will send an email to HR requesting that this absence be deleted.



Note: *Managers or administrators cannot delete sickness absences from iTrent.*

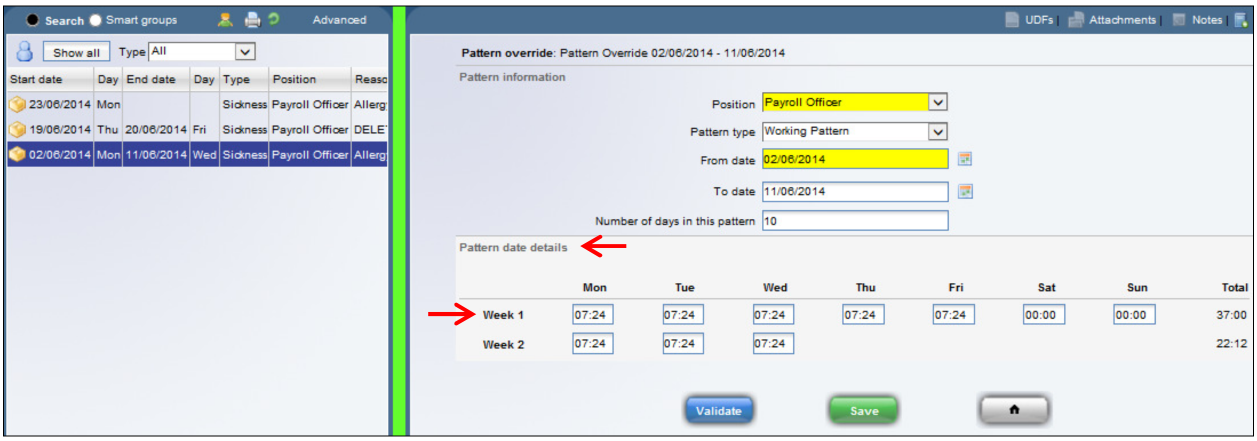
2.4.4. Input New – Pattern override for sickness absence

If you need to change the working pattern relating to a sickness absence you will need to click the Input New – Pattern override for sickness absence link. You will be prompted for the staff member's surname.



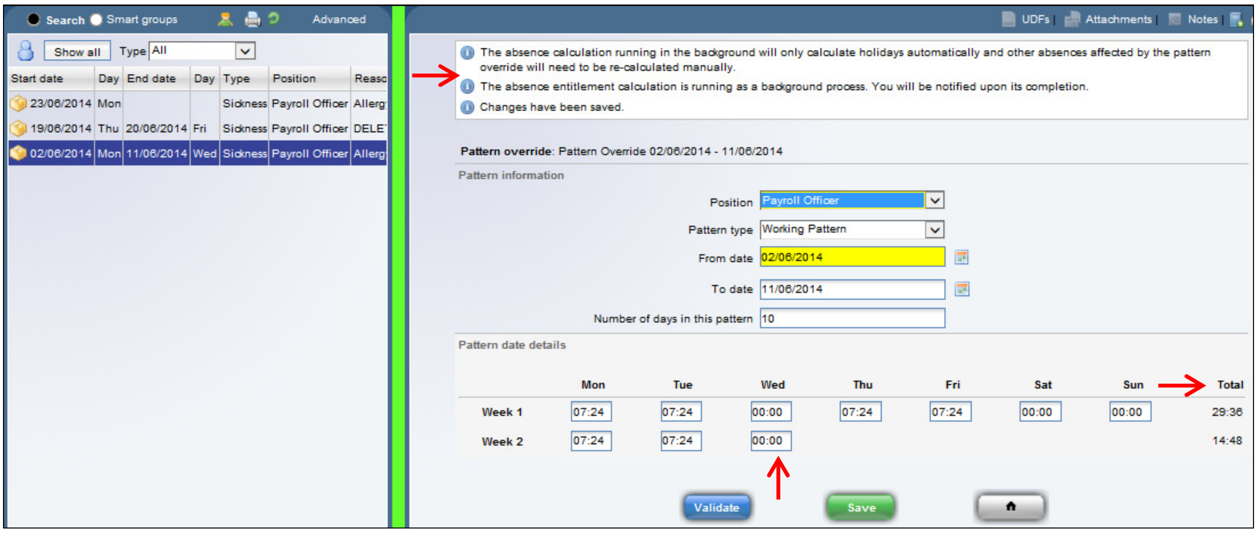
Type in the surname and click search .

The staff member's working pattern override screen will be displayed.



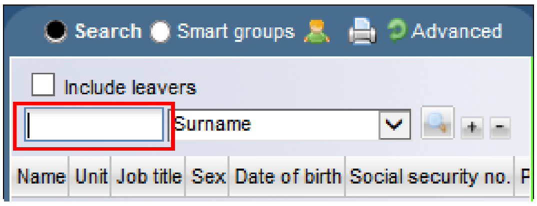
The pattern information will display the staff member's position, pattern type (always working pattern), from and to dates of the sickness, number of days in the pattern relating to the absence and details of the number of hours in the absence pattern.

To change the member of staff's hours for a particular day within the absence simply click the day field under 'Pattern date details' and type in the new hours. Clicking 'Validate' will validate the hours into a correct data format e.g. if you typed in 600 (for 6 hours) the validate button will change it to 06:00. When all changes have been made click 'Save', the system will re-calculate the absence as a background process. Please note that this works in hours and minutes. The changes you have just made will be reflected in the Total.



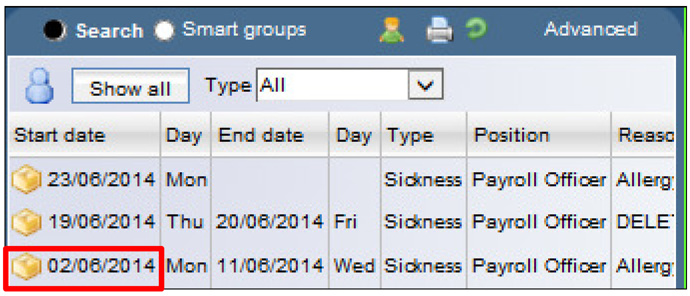
2.4.5. Input New – Sickness Certification

To add details of a doctor/hospital certificate relating to a previous or ongoing sickness absence for a member of your staff click the Input New – Sickness Certification link. You will be prompted for the staff member's surname.



Type in the surname and click search .

You will be prompted to select a sickness absence that you wish to add details of a doctor/hospital certificate to.



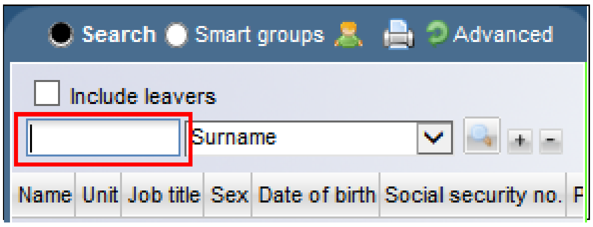
The staff member's Certification details screen will be displayed.

If you have already attach a doctor/hospital certificate before you will see the details of that certificate in the Object Pane.

Fill in the new certificate details and click 'Save'. iTrent will notify Payroll of the doctor/hospital certificate you have just added.

2.4.6. View / Amend – Sickness Certification

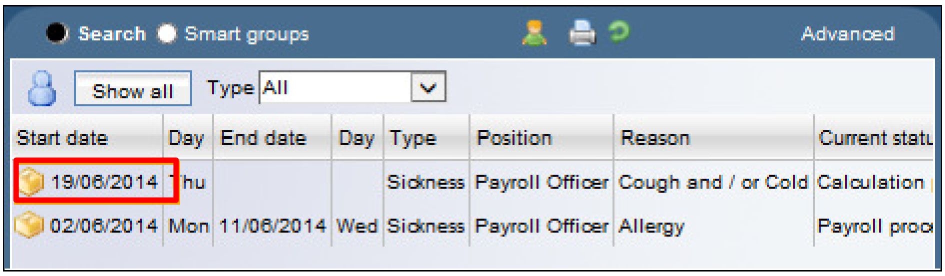
To view/amend or update a sickness certification attached to a sickness absence for a member of your staff click the View/Amend – Sickness certification link. You will be prompted for the staff member's surname.



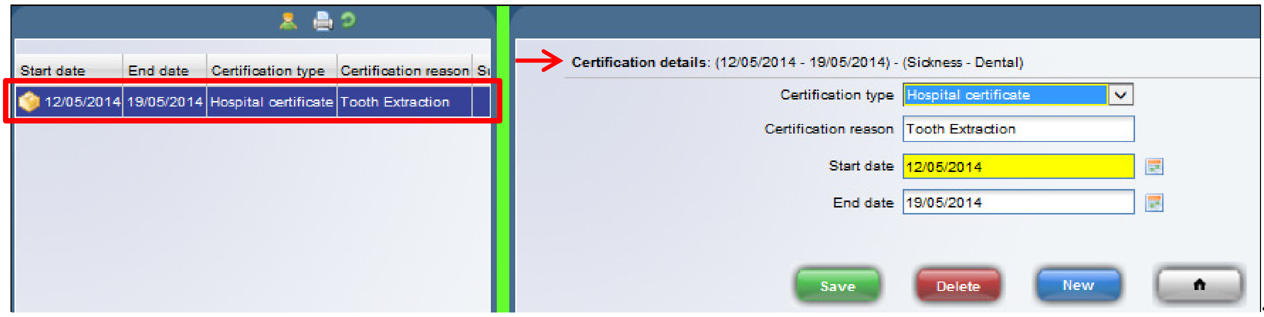
Type in the surname and click search .

Note: *If no doctor/hosptial certifate has been entered into iTrent then the search box will remain blank.*

From the Object pane select the absence that the doctor/hospital certificate relates too.



Then select the required doctor/hospital certificate from the Object Pane



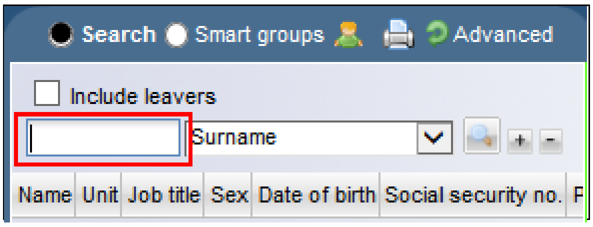
From the certification details page you can update/amend the details or click the 'New' button to add another certificate as required.

You can also delete the sickness certificate if added in error. Care must be taken as this could have an effect on Payroll.

2.4.7. View – Sickness absence stage

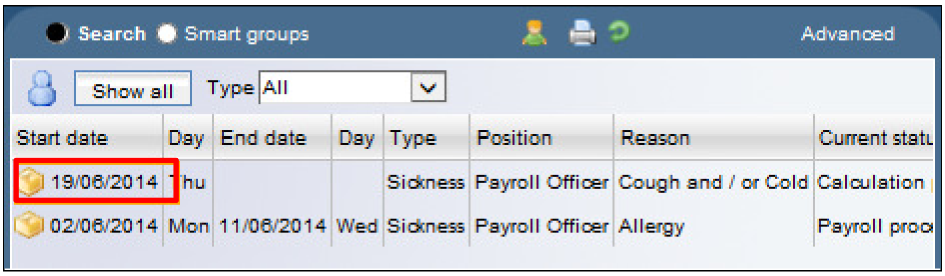
Sickness absence stages are input and updated by HR.

To view a sickness absence stage for a sickness absence for a member of your staff click the View – Sickness absence stage link. You will be prompted for the staff member's surname.

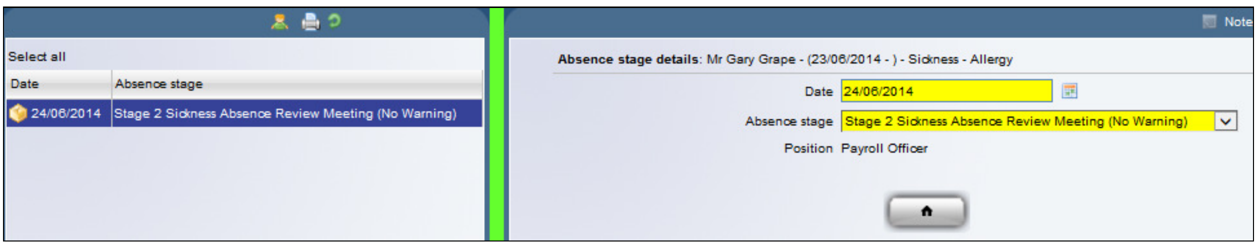


Type in the surname and click search .

From the Object pane select the absence that has the absence stage details attached. You may need to check with HR if unsure.



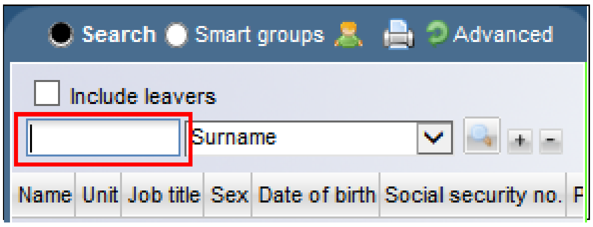
The staff member's 'Absence stage details' screen will be displayed.



2.4.8. View – Sickness absence documents

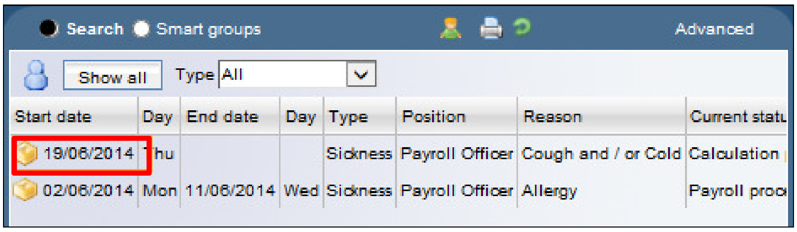
If HR has attached documents to a sickness absence you will be able to view these here depending on security and confidentiality of the document you wish to view. For example if a scanned image of a doctor certificate has been attached to a member of your staff you will be able to view this here.

To view sickness absence documents for a member of your staff click the View – Sickness absence documents link. You will be prompted for the staff member's surname.

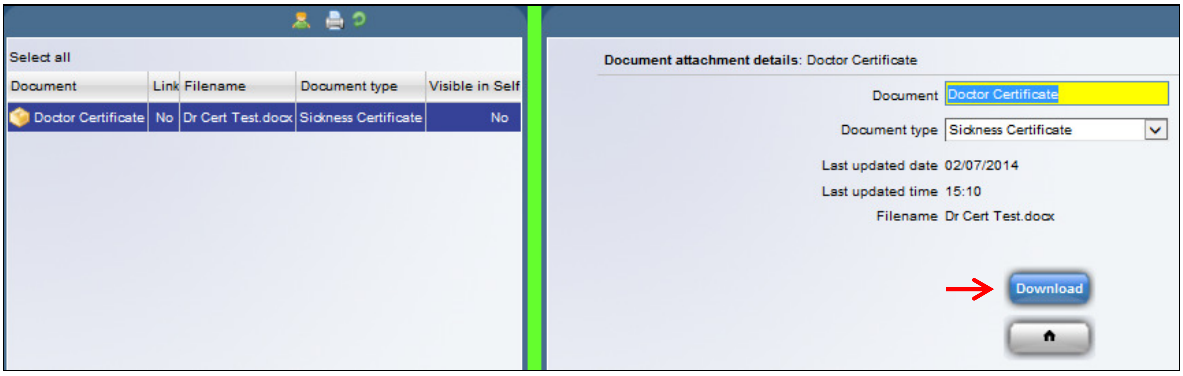


Type in the surname and click search .

From the Object pane select the absence that you know will have a document/image attached. You may need to check with HR if unsure.

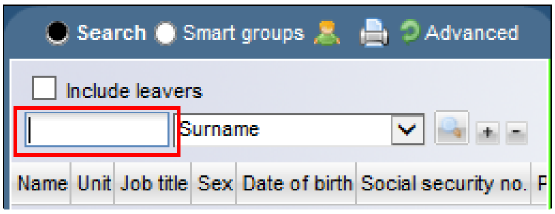


The staff members documents will be listed in the Object Pane, click on the document you wish to view and click 'Download' from the 'Document attachment details' screen.



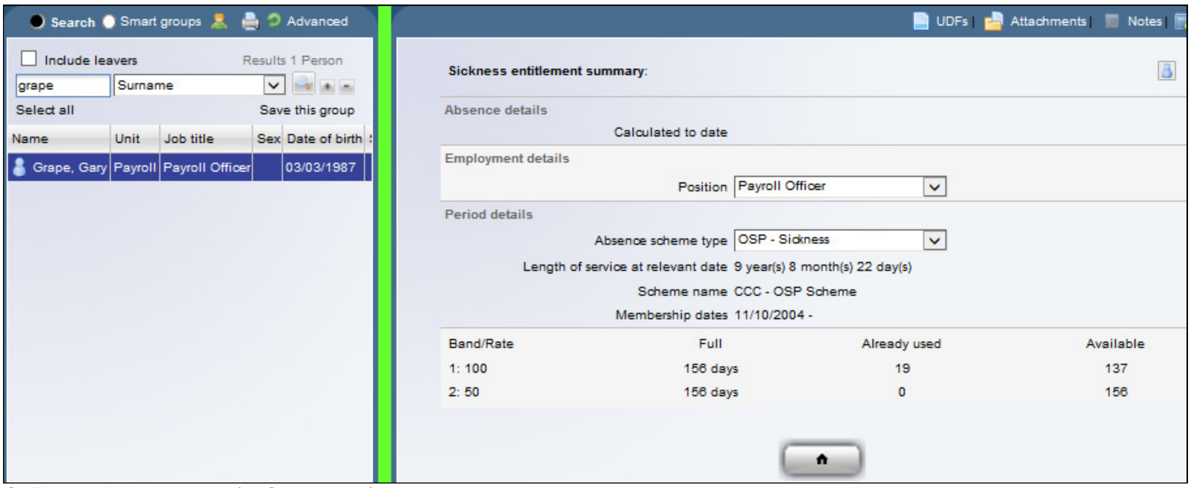
2.4.9. View – Occupational Sick Pay Summary

To view a member of your staff's sickness record click the 'View – Occupational Sick Pay Summary'. You will be prompted for the staff member's surname.



Type in the surname and click search .

The staff member's current sickness record will be displayed.

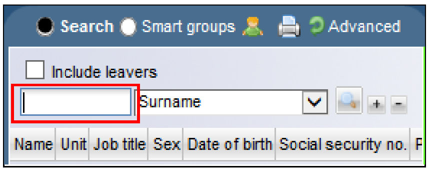


2.5. Absence information

2.5.1. View – Absence Calendar

As a People Manager user you may wish to review any absences within your reportees.

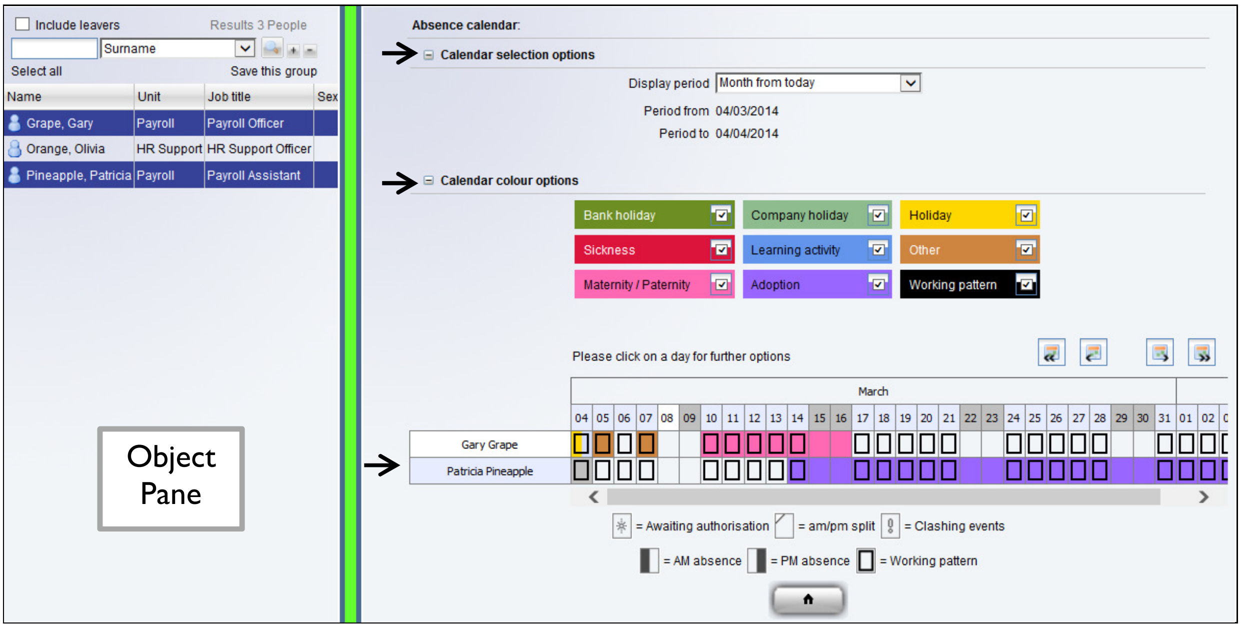
Firstly click on the View – Absence Calendar link. You will be prompted a staff member's surname.



(By clicking the search icon only this will display all your reportees)

Having searched for all your reportees you can then, if required, select all (or some) of them from the Object Pane by using the Ctrl key and clicking each required name:

The absence calendar enables you to view, amend and create absences and related information for the selected list of people highlighted.



The calendar display page has three sections:

2.5.2. Calendar selection options

The Calendar selection options are displayed at the top of the page. If required you can hide the options by clicking the minus icon. The display period can be changed by selecting the drop down menu.

The following table describes the different 'Display periods':

Month from today	The display will show the calendar from today to the same day number in the following month.
Month centred on date	The display will show the effective date at the centre of the display period with 14 days before and after the date.
Quarter from today	The display will start on the effective date and display 3 months after that date.
Specific date range	When selected the Period from and Period to fields are opened allowing you to enter the required date range. The range must not exceed 2 years.
This month	This display will show the complete month which the effective date is in.
This quarter	This display will show the complete quarter which the effective date is in.
This week	The display will start on the Sunday of the week that the effective date is in and display 7 days.
Yearly view (dates)	This option is only available when a single person/absence has been selected.
Yearly view (days)	This option is only available when a single person/absence has been selected.

Other options:

Period from	Displays either the pre-selected display period or, when Specific date range has

Period from	been selected, fields to allow you to enter the start and end dates of the period to be shown.
Position	When a single person has been selected and they have more than one job then you can choose to display information either about a single job or all jobs.
	When you enter specific date ranges you will need to click the Refresh button. Note that an automatic refresh will take place. If you change from one person selected to many, then iTrent will display the following message: 'You have changed your selection. iTrent will reload this page from your last selection'.

2.5.3. Calendar colour options

The Calendar colour options are initially displayed hidden. You can reveal the options by clicking the plus icon. This section is also used to identify the absence types that you wish to have displayed on the calendar and the colour that they will be displayed in. Any colour changes will be reflected in the Out of Office section of the Home page.

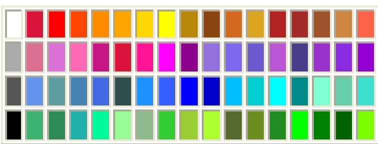
Absences to be displayed:

The calendar can be filtered to show or exclude various absence types, Learning activity and Working patterns. Tick the check box to include the selection. Un-tick it to remove it from the display.

NB: Absences recorded under Non-Working periods will be displayed on the calendar sharing the colour used for Other absences.

Colour of Displayed Absences:

You can change the colour associated with a filter. Click on the filter name and a colour selection box will open:



Click on the required colour and the filter background will change to the new selection.

Any changes that you make to the colour selections are saved automatically for use next time that you use the calendar.

2.5.4. The Calendar

The people that the calendar relates to are shown on the left hand side. Each absence is shown as a coloured box. When the display period or the number of people exceeds the screen capacity, scroll bars are provided to enable you to move left or right and/or up and down. The headings to the calendar and the people names will always remain in focus.

Display period adjustment buttons:

	Go back 3 months	The display is extended to include the previous three months.
	Go back 1 month	The display is extended to include the previous month.
	Go forward 1 month	The display will be extended to include the following month.
	Go forward 3 months	The display will be extended to include the following three months.

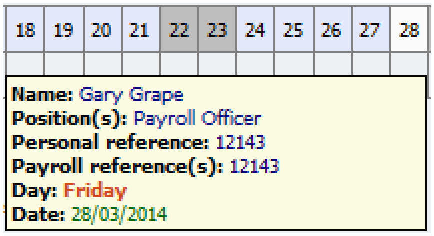
2.5.5. Calendar display

The people displayed are either the people that you selected when navigating to the page or the people in the peer group when the Peer group calendar is displayed.

The grid for the calendar displays absences and training using the colour codes defined by the filter.

Weekends are shown shaded in the day number display: 

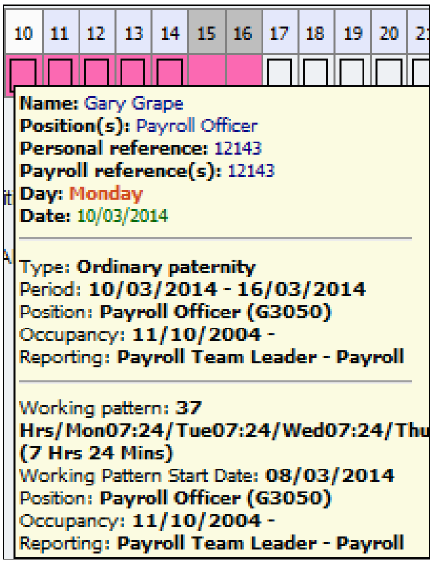
When you move the cursor over the cells in the display a pop up is shown, holding the details of either the absence or the person, when no absence is recorded. For example when the cursor is on an empty cell information similar to this example is displayed:



The name of the person, their position(s) and the Day and Date is displayed.

Note also that the name of the person and the day selected are shown with a white background.

When the cursor is on a cell which has a recorded absence the pop up information will be similar to the following:

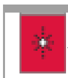
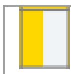
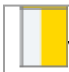
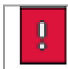


The first section displays the name of the person, their position(s) and the Day and Date is displayed.

The next section displays the Type of absence and its period and its status. The position to which the absence has been applied, the persons Occupancy dates in the position and the Reporting manager of the position. If the Absence is applied to several positions then each position will be reported in a separate section.

The last section of the pop up shows the employee Working pattern details.

2.5.6. Calendar additional information

Awaiting authorisation	 When an absence is awaiting authorisation each day of the absence will display an asterisk (note that only a single authorisation will be required to authorise the complete absence). The pop up for the absence will show the Status of the absence as being awaiting authorisation.
Half day AM absence	 When an absence has been recorded as a Half day – AM the left side of the cell is in the absence colour.
Half day PM absence	 When an absence has been recorded as a Half day – PM then the right side of the cell is in the absence colour.
Clashing events	 When an absence has been recorded that clashes with another absence (A sickness on the same date as a personal holiday for example) the day of the absence will display an exclamation mark. The pop up will display the details of the absences that are clashing.

Working pattern	When an employee has a working pattern attached and you have selected Working patterns to be displayed then each working day is shown with an inner box. Absences that occur on a working day are shown with their absence colour and the box; . If an employee does not display inner boxes on working days the employee's working pattern may be configured wrong, which will affect holiday entitlement. If you only want to display working patterns for absences then you should set the working pattern colour to be the same as the background colour.

2.5.7. Calendar Actions

Actions are available on the Absence calendar but not on the Peer group calendar.

If you click on a cell in the calendar display (relating to a specific person and date) you are able to perform several tasks depending on the type of absence or cell selected. A pop up is displayed showing you the options available. For example:

Holiday

- Update/Delete this holiday absence
- Create sickness absence
- Create holiday absence
- Create 'other' absence
- Check holiday entitlement
- Check sickness entitlement

Sickness

- Update/Delete this sickness absence
- Sickness certification
- Create sickness absence
- Create holiday absence
- Create 'other' absence
- Check holiday entitlement
- Check sickness entitlement

Paternity

- Update/Delete this paternity absence
- Create sickness absence
- Create holiday absence
- Create 'other' absence
- Check holiday entitlement
- Check sickness entitlement

Other

- Update/Delete this 'other' absence
- Create sickness absence
- Create holiday absence
- Create 'other' absence
- Check holiday entitlement
- Check sickness entitlement

Adoption

- Update/Delete this adoption absence
- Create sickness absence
- Create holiday absence
- Create 'other' absence
- Check holiday entitlement
- Check sickness entitlement

Bank Holiday

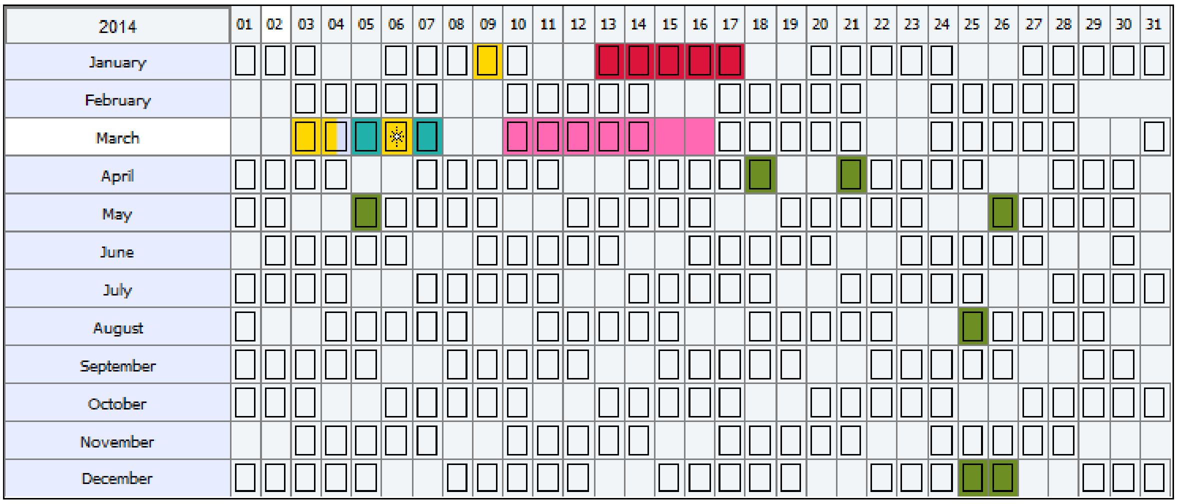
- Create sickness absence
- Create holiday absence
- Create 'other' absence
- Check holiday entitlement
- Check sickness entitlement

NB: Some of the tasks presented are only available to you if you have the required security and authorisation status. When you create a new absence, iTrent will open a new tab page and enter the start date of the absence. When you have completed any other details on the page and then click Save, iTrent will save the details, close the tab page and return you to the Absence calendar.

Action	iTrent will open a New view and display…	Comments
Create holiday absence	Holiday absence details	The date will be automatically entered for you from the date on the calendar where you selected this option. Enter the absence fields as required and then click 'Save'.
Create other absence	Other absence details	The date will be automatically entered for you from the date on the calendar where you selected this option. Enter the absence fields as required and then click 'Save'.
Check holiday entitlement	Holiday entitlement summary	You can review the holidays taken, duration and remaining entitlement for the selected Employee.
Update / Delete absence	Holiday absence details Other absence details	Update the absence as required. When you Save the details any authorisation processes you have will be actioned.
	Maternity absence details Paternity absence details	As you only have view access you will not be able to delete these absences.

2.5.8. Absence Calendar / Yearly View (Dates)

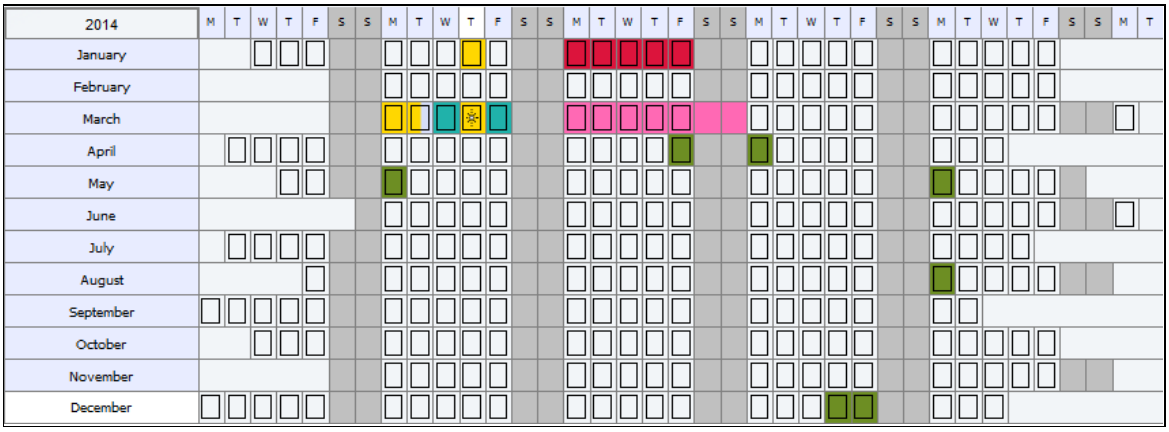
When a single employee has been selected you are able to display the calendar in Yearly view (dates):



The calendar will show, for the selected person / absence, the months of the year down the left side of the calendar. Across the display are shown the dates. Each absence is shown with its colour code. Details about each absence day are displayed as pop ups, as you move your cursor over the dates.

2.5.9. Absence Calendar / Yearly View (Days)

When a single employee has been selected you are also able to display the calendar in Yearly view (days):



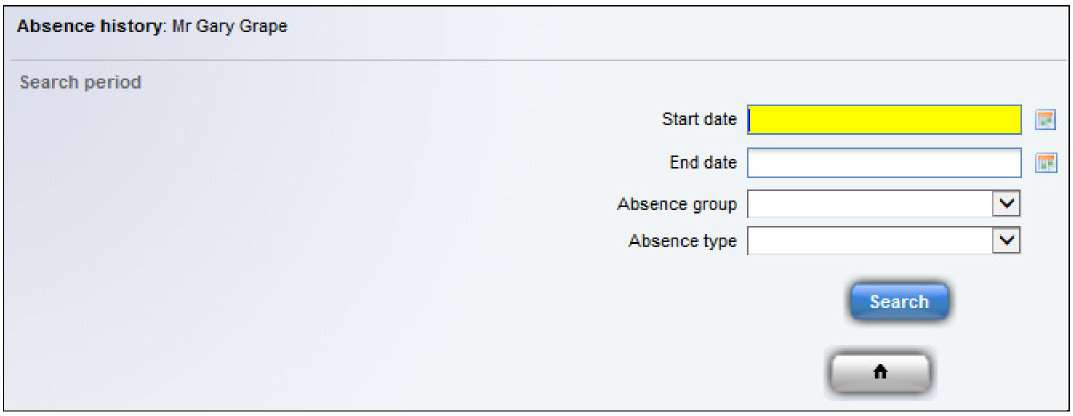
The calendar will show, for the selected person / absence the months of the year down the left side of the calendar. Across the display are shown the days of the week. Each absence is shown with its colour code. Details about each absence day are displayed as a pop up, as you move your cursor over the dates.

The different yearly views offered allow identification of trends. For example:

- Absences relating to the same period each month (e.g. around monthly input deadlines)
- Absences relating to particular days of the week (e.g. Friday/Monday absences)

2.5.10. Absence History

This allows the user to search through the absence history of an individual staff member between selected dates. The start date of the search period is mandatory. The returned results will be listed on screen.



2.6. Absence Reports

The reports listed below focus on positions that report (or have reported) to the manager's position in the period specified:

- Absence Frequency
- Absence Summary
- Friday-Monday Absences

- Absence Tolerance - This report will only include current reportees (i.e. people who

report to the manager's position on the run date of the report).

- Outstanding Holiday

Generally, the absences that are reported are those which occurred in those positions in the period specified.

If the person leaves the reporting line by either leaving the position or the position moving in structure then absences will not be included after this date.

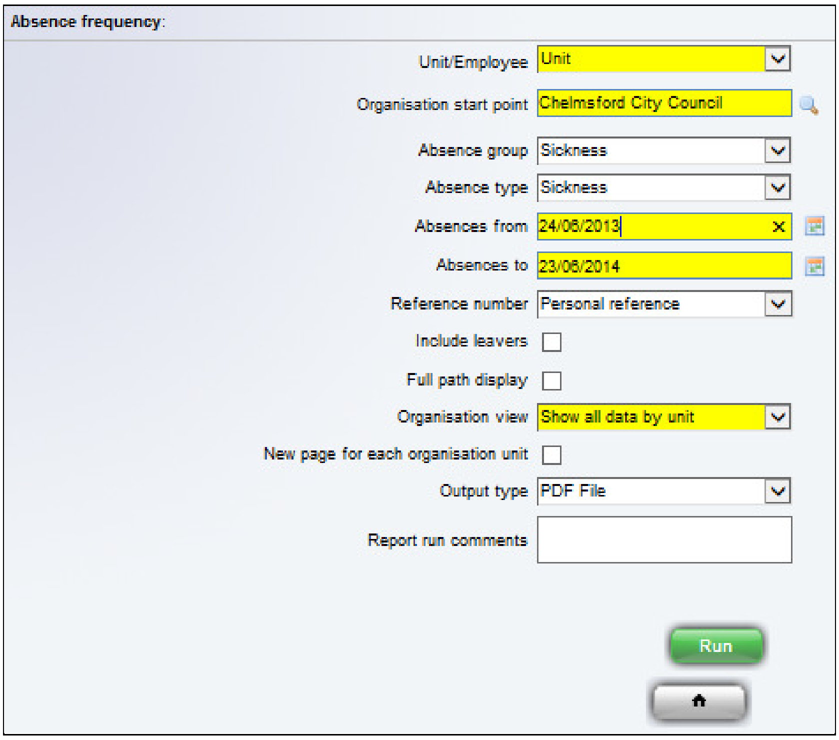
If a position moves into the reporting line part way through a period, then all absences in that position for the people selected, prior to the transfer, will be returned. These absences will be shown against the units in which they occurred, even if the manager in question is not responsible for that particular unit. (Unless the option for Organisation view on the Run report page is set to Show all data as top unit.)

However, where a person transfers into a position in the manager's reporting line only absences relating to this position from the date of transfer will be shown.

2.6.1. Absence Frequency

The report shows number of absences, days lost and hours lost for each employee who has had a sickness absence. The report will be broken down by section/service or run for an individual employee and will show overall totals for the section/service depending on structure security.

The report will provide details of total hours lost due to sickness absence which is based on the dates you specifies. This could be used to calculate FTE days lost.



Unit/Employee	Select to report on an organisation unit or a specific employee depending on your structure security.

Organisation start point /employee	Enter the required start point for the report or the employee – You will be able to search the whole structure but iTrent will only produce results based on your structure security – always use default Chelmsford City Council.
Absence group	Select sickness from the drop down menu.
Absence type	Select sickness from the drop down menu.
Absences from	Enter the date of the first absence to be included in the report.
Absences to	Enter the date of the last absence to be included in the report.
Reference number	Select from the drop down list which reference you wish to see next to each employee listed Personal reference or Employee payroll number.
Include leavers	If you select to include leavers then the report will include people who have left the organisation during the selected date range.
Full path display	This setting determines the format of the printed report hierarchy.
Organisation view	Select from: Show all data by unit/Show all data as top unit/Only include data in top unit
New page for each organisation unit	If selected each organisation unit will be displayed on a separate page.
Output type	Select the required output type from the drop down list.
Report run comments	Enter any comments to annotate the report.

2.6.2. Absence Summary

This report provides a summary of all absences within the selected period. It shows the number of days lost for each reported absence.

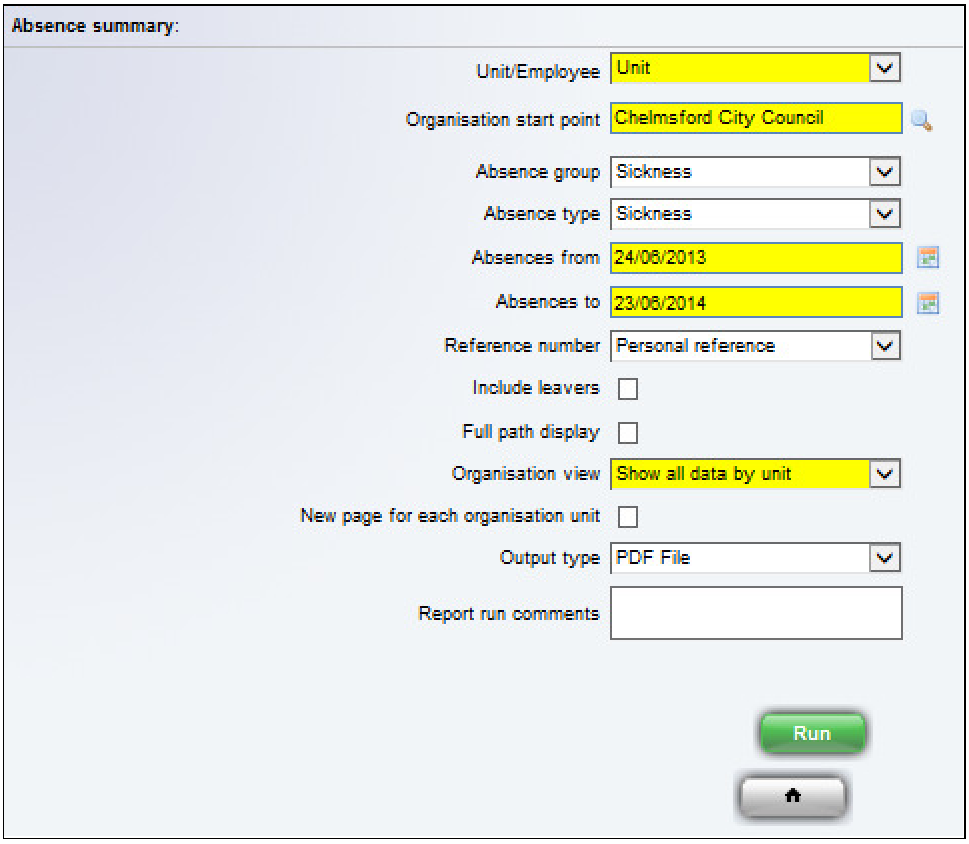
The data this report outputs is subject to structure security. When a user runs the report it will only output data for the structures they have access to, so that confidentiality is not compromised. If the user currently has access to the position, then they can see all of the history of the position occupant.

You could use this report instead of the Monday Friday Absence report as you will see how many Mondays and Fridays each employee has had off.

The report does not specify absence dates as is a summary of all absences.

The report details days lost, number of absences and how many of those days were only single days. It will show the number of days lost against days of the week allowing the manager to see the worst day for sickness e.g. Friday.

The report will cover sick stats throughout the year based on dates you specify.



Unit/Employee	Select to report on an organisation unit or a specific employee depending on your structure security.
Organisation start point /employee	Enter the required start point for the report or the employee – You will be able to search the whole structure but iTrent will only produce results based on your structure security – always use default Chelmsford City Council.
Absence group	Select sickness from the drop down menu.
Absence type	Select sickness from the drop down menu.
Absences from	Enter the date of the first absence to be included in the report.
Absences to	Enter the date of the last absence to be included in the report.
Reference number	Select from the drop down list which reference you wish to see next to each employee listed Personal reference or Employee payroll number.
Include leavers	If you select to include leavers then the report will include people who have left the organisation during the selected date range.
Full path display	This setting determines the format of the printed report hierarchy.
Organisation view	Select from: Show all data by unit/Show all data as top unit/Only include data in top unit
New page for each organisation unit	If selected each organisation unit will be displayed on a separate page.
Output type	Select the required output type from the drop down list.
Report run comments	Enter any comments to annotate the report.

2.6.3. Absence Tolerances

This report records all absences between specified dates which fall within the criteria you set for percentage number of days, number of absences and number of days absent.

Absences will only be reported once per position.

The Days available field in the report will show the total number of each employee's working days in the reporting period (not their total).

If available, the absence reason stored against the position will be shown on the report output, however if there is none available the person level absence reason will be shown.

If you do not specify any criteria the report will include all absences within the specified period.

You can enter more than one criteria to produce the information you require. The individual entries are combined using a logical 'AND' operation.

Example 1 – Using the AND operator:

Combine with	= AND
% Working days	= 0
Number of absences	= 3
Number of days absent	= 8

The above would list all people who have been absent for a total of 8 days or more provided that they have had at least 3 absences.

Example 2 – Using the OR operator:

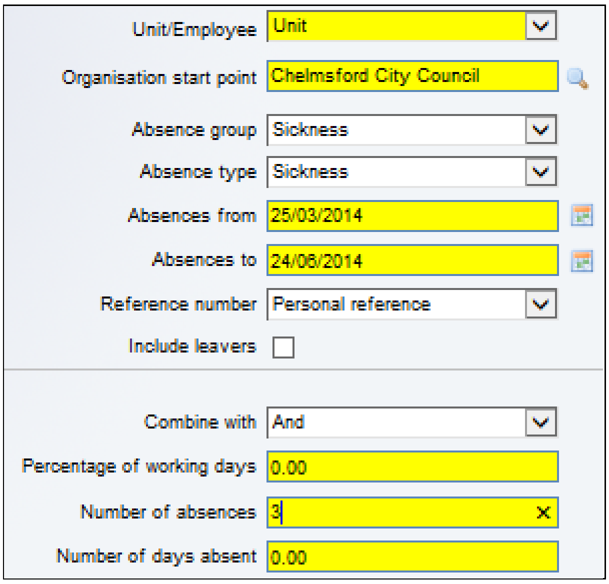
Combine with	= OR
% Working days	= 100.00
Number of absences	= 3
Number of days absent	= 8

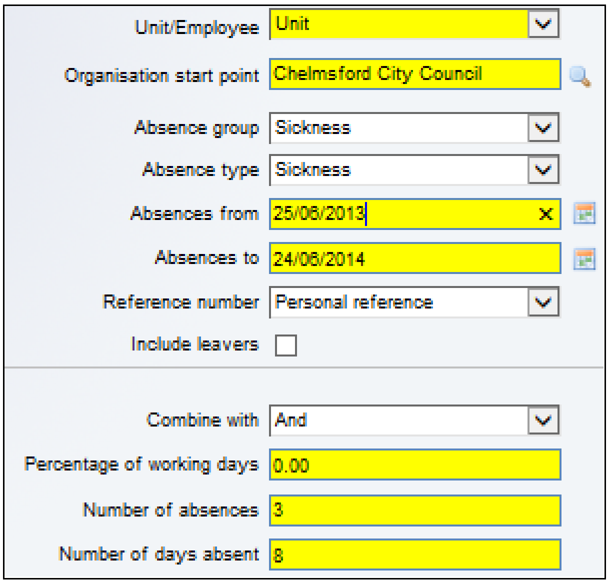
The above would list all people who have been absent for a total of 8 days or more, or who have had at least 3 absences.

You could run this report to show employees who have hit the sickness triggers aswell as receiving the information from HR. See below for sickness triggers 1-4.

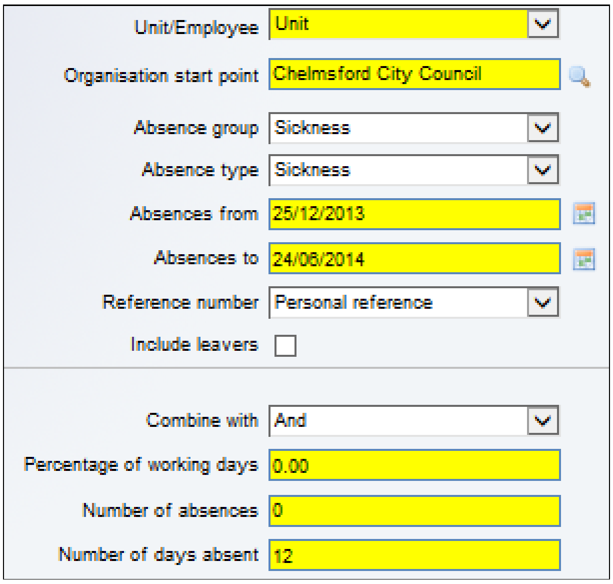
Trigger 1 - *Three or more occasions of sickness absence during a three month rolling period*

Trigger 2 - *Eight or more days sickness absence, on three or more occasions in a twelve month rolling period.*





Trigger 3 - *Twelve or more days in a 6 month rolling period.*



Trigger 4 - *Any other recurring recognisable patterns, such as frequent absenteeism on a Monday or Friday, or avoiding particular work tasks.*

Unit/Employee	Select to report on an organisation unit or a specific employee depending on your structure security.
Organisation start point /employee	Enter the required start point for the report or the employee – You will be able to search the whole structure but iTrent will only produce results based on your structure security – always use default Chelmsford City Council.
Absence group	Select sickness from the drop down menu.
Absence type	Select sickness from the drop down menu.
Absences from	Enter the date of the first absence to be included in the report.
Absences to	Enter the date of the last absence to be included in the report.
Reference number	Select from the drop down list which reference you wish to see next to each employee listed Personal reference or

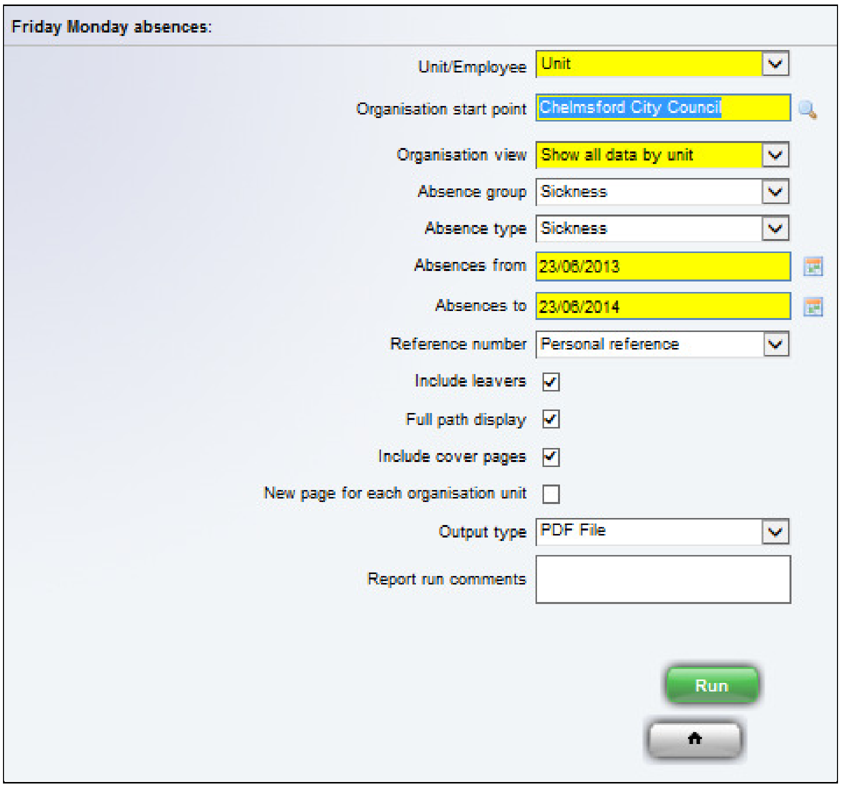
	Employee payroll number.
Include leavers	If you select to include leavers then the report will include people who have left the organisation during the selected date range.
Absence tolerance limits	
Combine with	You are able to specify 3 conditions in the following fields which define your tolerances for the report. These can be controlled by specifying the conditions as either logical ANDs or ORs. Select your condition requirement from the drop down list.
Percentage of working days	Calculated from the actual available working days in the period and the days absence within that period. The calculation does not take into account any holiday absence during the period. If you are using the AND condition and wish to exclude this control value, then enter a 0.0 in the field. If you are using the OR condition and wish to exclude this control value, then enter 999.0 in the field.
Number of absences	The number of individual absences within the specified period with no regard for their duration. If you are using the AND condition and wish to exclude this control value, then enter a 0 in the field. If you are using the OR condition and wish to exclude this control value, then enter 999 in the field.
Number of days absent	The total number of days absent within the specified period. If you are using the AND condition and wish to exclude this control value, then enter a 0 in the field. If you are using the OR condition and wish to exclude this control value, then enter 999 in the field.
Full path display	Tick this box if you want the employee's full position in structure to be displayed.
Organisation view	Select from: Show all data by unit. Show all data as top unit. Only include data in top unit.
New page for each organisation unit	If selected each organisation unit will be displayed on a separate page.
Output type	Select the required output type.
Report run comments	Enter any comments to annotate the report.

2.6.4. Friday Monday Absences

This report lists all of the absences within the selected period where the period of absence starts no earlier than Friday and ends no later than the following Monday.

The data this report outputs is subject to structure security. When a user runs the report it will only output data for the structures they have access to, so that confidentiality is not compromised. If the user currently has access to the position, then they can see all of the history of the position occupant.

The report will show those employees who had a Fri-Mon absence (marked as 'Yes') but the report will also show any one day absences that fall on either a Friday or Monday so the report could be lengthy.

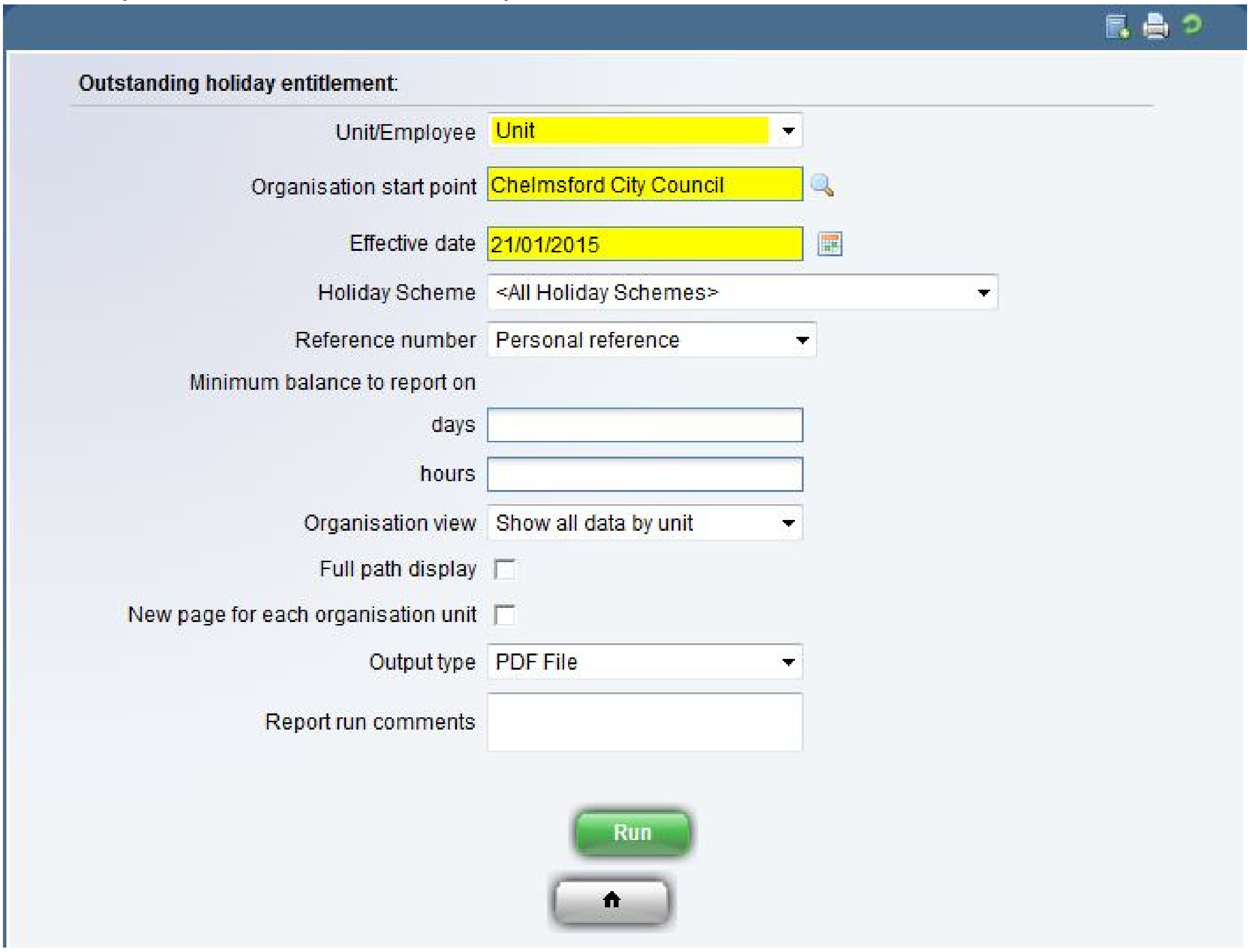


Unit/Employee	Enter the required start point for the report or the employee – You will be able to search the whole structure but iTrent will only produce results based on your structure security – always use default Chelmsford City Council.
Organisation start point /employee	Enter the required start point for the report or the employee – You will be able to search the whole structure but iTrent will only produce results based on your structure security – always use default Chelmsford City Council.
Absence group	Select sickness from the drop down menu.
Absence type	Select sickness from the drop down menu.
Absences from	Enter the date of the first absence to be included in the report.
Absences to	Enter the date of the last absence to be included in the report.
Reference number	Select from the drop down list which reference you wish to

	see next to each employee listed Personal reference or Employee payroll number.
Include leavers	If you select to include leavers then the report will include people who have left the organisation during the selected date range.
Full path display	This setting determines the format of the printed report hierarchy.
Organisation view	Select from: Show all data by unit/Show all data as top unit/Only include data in top unit
New page for each organisation unit	If selected each organisation unit will be displayed on a separate page.
Output type	Select the required output type from the drop down list.
Report run comments	Enter any comments to annotate the report.

2.6.5. Outstanding Holiday Report

This report lists all your employees' outstanding holiday balance, including their entitlement, how much they've taken, and how much they've scheduled.

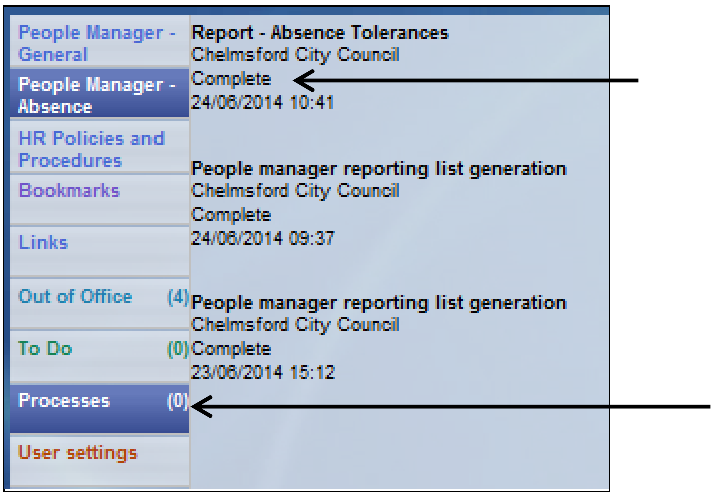


Unit/Employee	Unit will allow you to run the report on those people reporting to you, whereas employee would focus on a single employee.

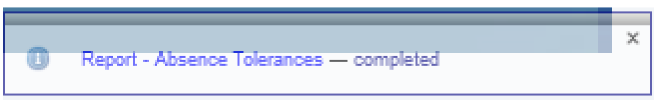
Organisation start point /employee	Enter the required start point for the report or the employee – You will be able to search the whole structure but iTrent will only produce results based on your structure security – always use default Chelmsford City Council.
Effective date	Date of which you want the report.
Holiday Scheme	The type of holiday scheme you want to show, select 'all' for all holiday entitlements.
Reference number	Select from the drop down list which reference you wish to see next to each employee listed Personal reference or Employee payroll number.
Minimum balance to report on	Use this function if you want to exclude everyone under a certain holiday balance.
Full path display	This setting determines the format of the printed report hierarchy.
Organisation view	Select from: Show all data by unit/Show all data as top unit/Only include data in top unit
New page for each organisation unit	If selected each organisation unit will be displayed on a separate page.
Output type	Select the required output type from the drop down list.
Report run comments	Enter any comments to annotate the report.

2.6.6. Download Absence Report

When a report has completed and its status has changed to Complete you can see from your processes tab (also see section 8):



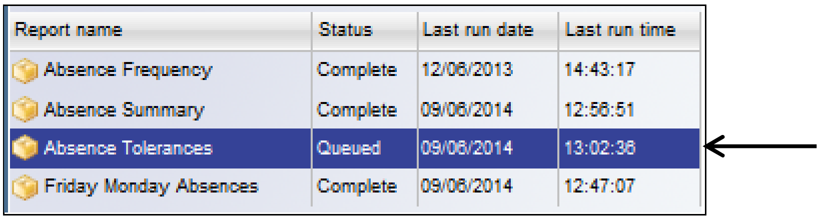
Or from the pop-up message in the bottom right corner of the screen:



You can then view the report output. The output needs to be downloaded to your machine in the following way:

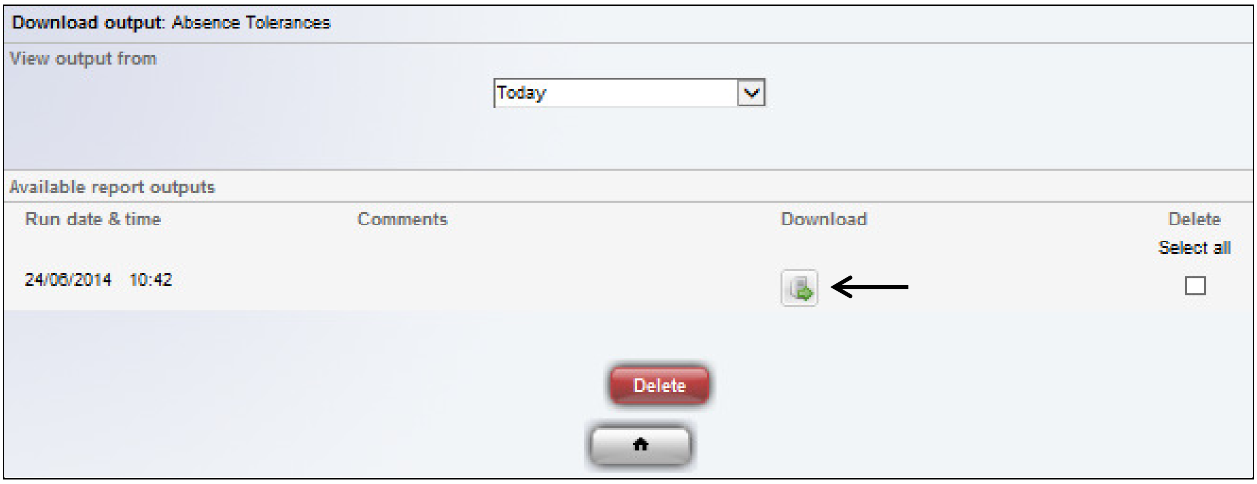
1. Within the 'People Manager Absence' tab select 'Download Absence Report'

2. Select the report from the Action pane you wish to download (here you will also see the progress of the report).



Report name	Status	Last run date	Last run time
Absence Frequency	Complete	12/06/2013	14:43:17
Absence Summary	Complete	09/06/2014	12:56:51
Absence Tolerances	Queued	09/06/2014	13:02:36
Friday Monday Absences	Complete	09/06/2014	12:47:07

3. The following screen can be used to view a list of all of the report output that you have created of the specific report selected. From this page you can download the report to look at the output or you can delete it.



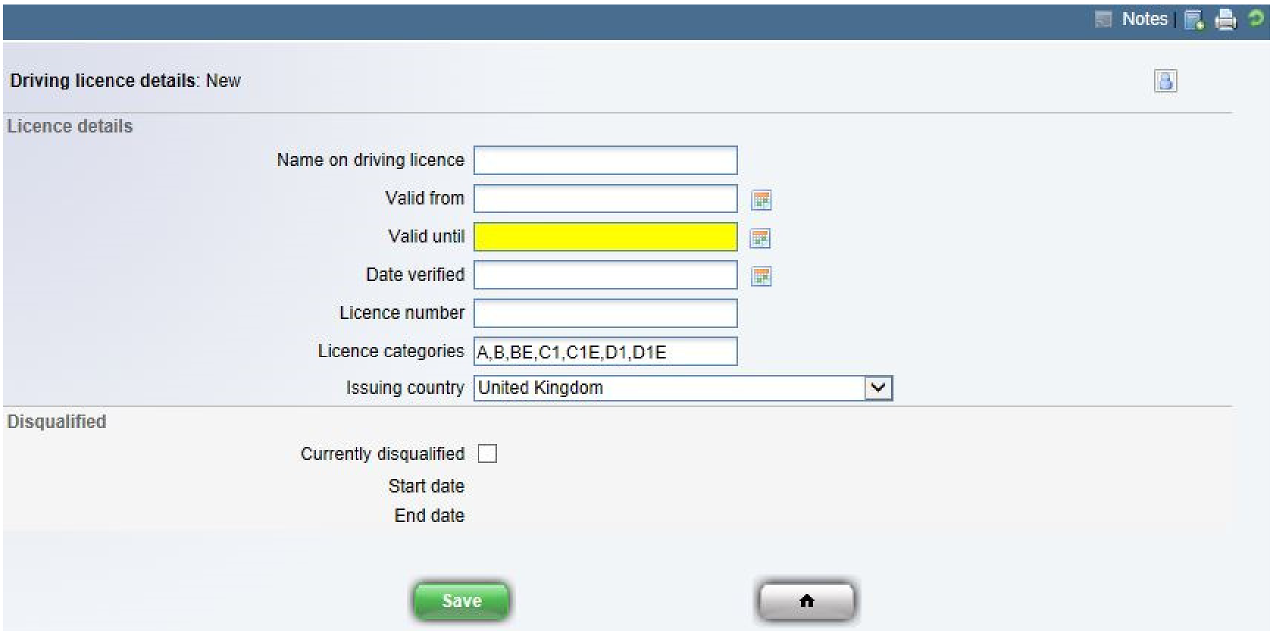
3. People Manager – Time & Expenses Tab

3.1. Driving for work

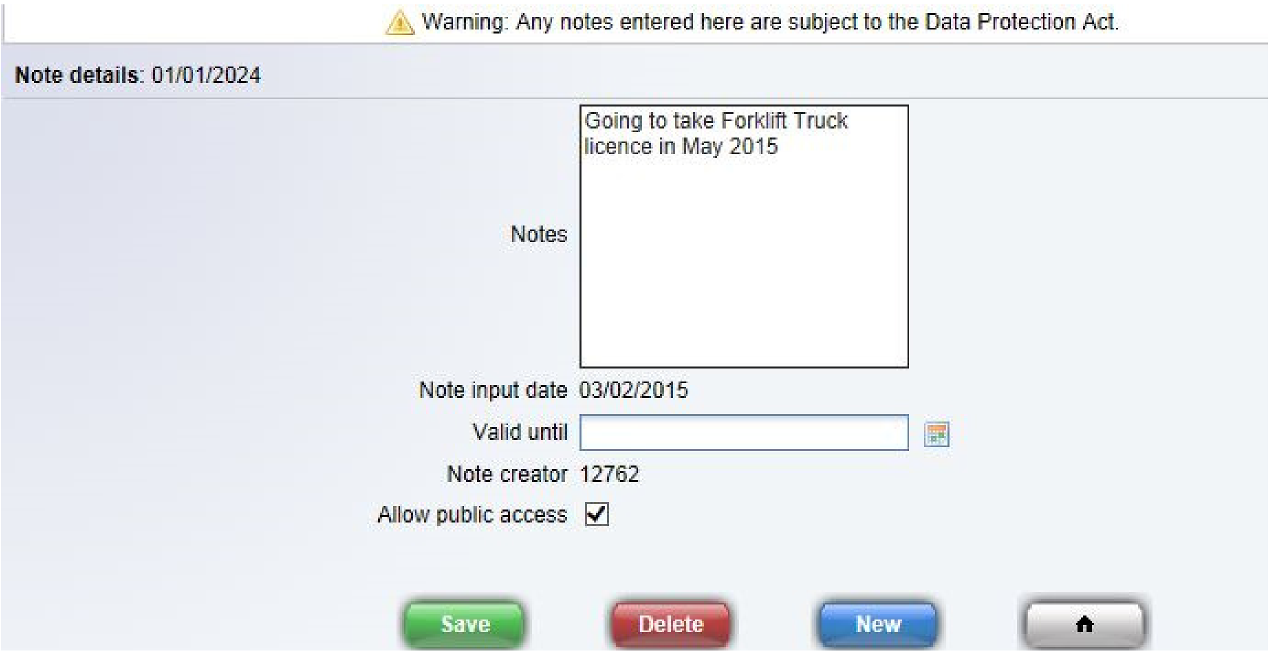
3.1.1. Driving Licence Details

If the selected employee already has driving licence details set up, this screen will show the current details. This includes the name, expiration date, licence number and categories, and whether there is a current disqualification. The valid until field will send out an expiry reminder by email when the driving licence is due to be renewed. Employees cannot amend their driving licence details themselves, so please make any required changes on their behalf.

If no licence has been set up, the screen will automatically go to 'new licence details' where you can put one in.



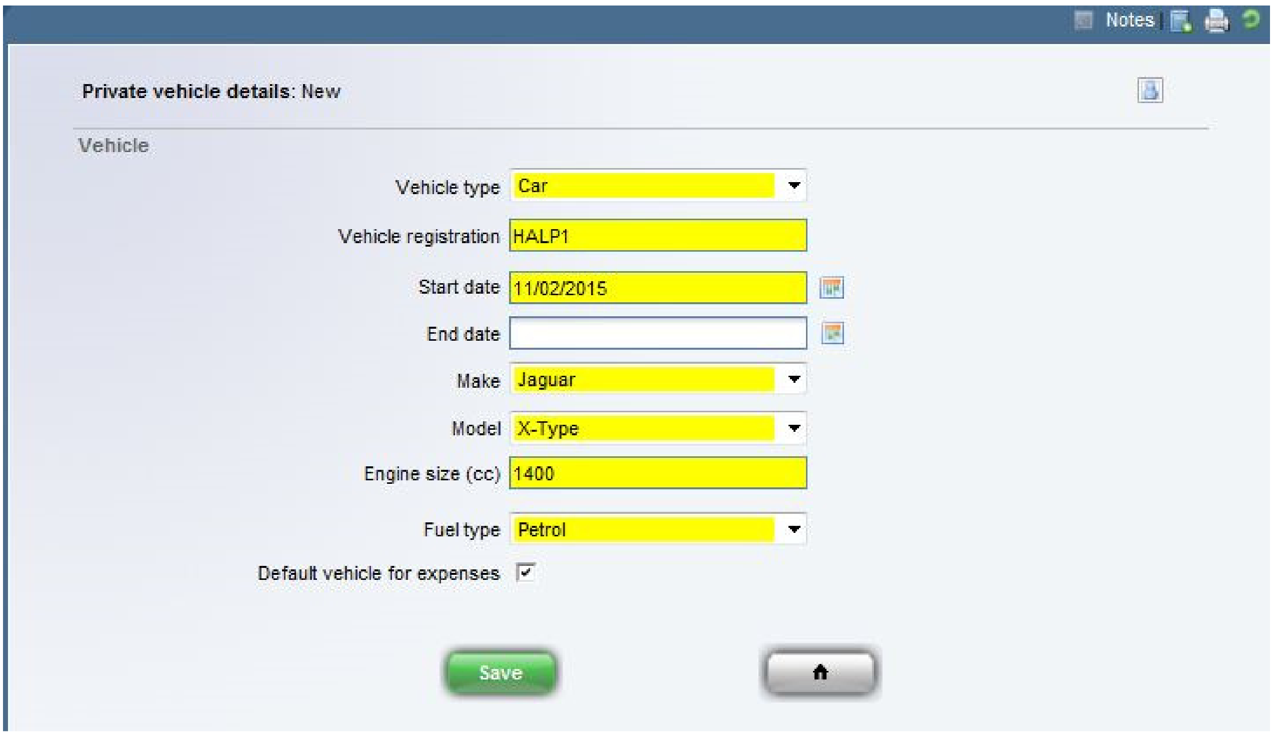
You can also enter notes against the person's driving licence, either by going to 'View / Amend – Driving Licence Notes' or by clicking on the 'Notes' button in the details screen. Notes could be used for example to point out current disqualifications, penalty notes, or other details that may be useful such as extra licences.



Notes stored against the Driving Licence can be deleted automatically by putting in a 'Valid until' date. By ticking the 'Allow public access' box, anyone with the appropriate access (such as HR and Payroll employees) will be able to see the note, if unticked only you will be able to see the note. Press 'Save' to save the note.

3.1.2. New Private Vehicle Details

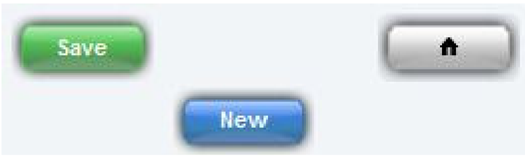
Employees need to have a vehicle attached to their profile if they want to claim mileage. Most vehicles will already be in the system, but if an employee has no car listed and wants to claim mileage, the reporting manager will have to add a vehicle before a mileage claim can be made. Please ask the employee for their car-details. Similarly, if an employee changes cars, the new car will have to be put into the system by the manager (see below for details).



The start date must be a date on or before the first mileage claim, as you cannot make a claim for a car that does not 'exist' at the time of the claim. Tick the 'default vehicle for expenses' box if the vehicle is used for mileage claims, as this will automatically use this car (as opposed to any others). If you are adding a second car, make sure you untick the default box on the older car to ensure the new car is used.

3.1.3. Amend Private Vehicle Details

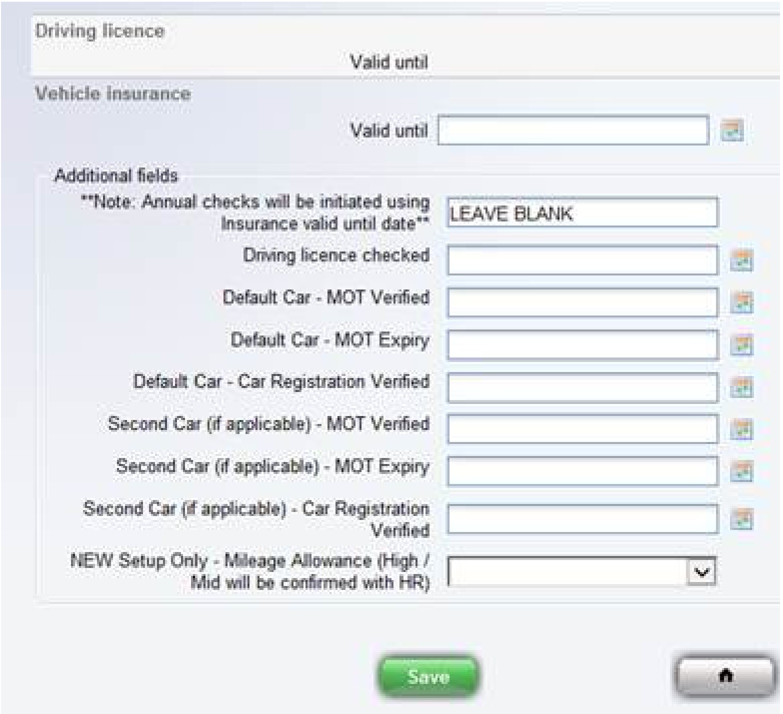
This screen will show any private vehicles currently attached to the person. It will include all relevant details such as the registration and the type of car, as in the screen above for inputting new vehicles. You can amend the details of any existing vehicles by selecting them in the left pane, changing the fields and pressing 'Save'. The 'New' button will bring you to the 'Input new private vehicle' screen (as above).



Vehicles cannot be deleted, and any old vehicles will be kept in the system as old claims are linked to those vehicles. If the employee has a new vehicle, the old vehicle should be given an end date, and the 'default vehicle for expenses' box unticked. The new vehicle should be added in this screen by the manager, making sure to include a start-date and that the default vehicle box is ticked. Note that if the employee changes cars in the middle of a month/claim, they will have to submit two claims that month: one for the old car and one for the new car.

3.1.4. Car User document validation

This screen lists the car user documentation to be checked, such as insurance, MOT and driver's license.



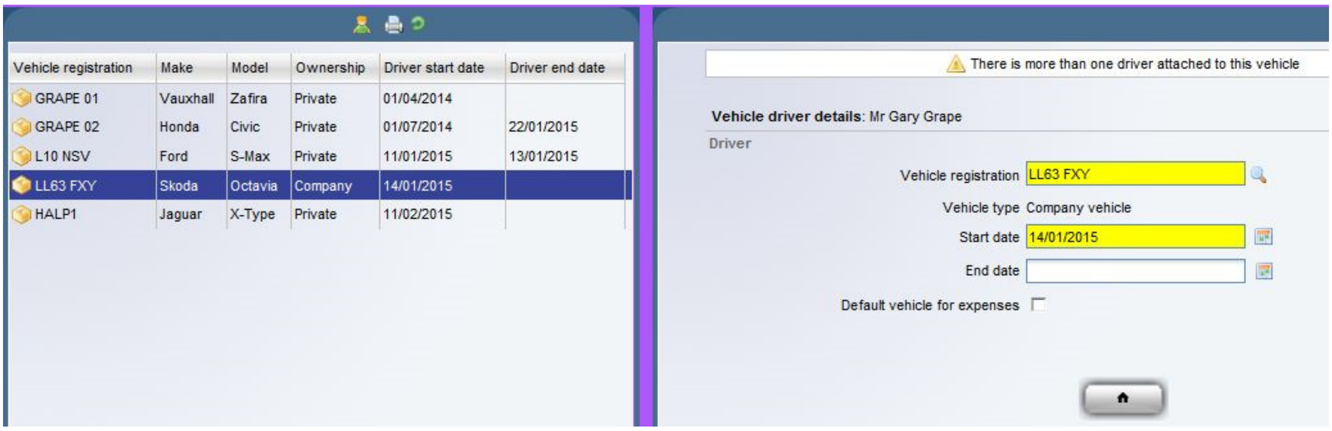
As a manager you are accountable for ensuring the employee has the appropriate car insurance. When setting up a new car, or if an employee changes cars, please ensure you see copies of all documents and fill in the details personally. For departments where administration gathers the relevant details, you are still responsible for checking the documents and putting it in the system to verify that you have seen the proper insurance documents.

Only the insurance valid until date has any function, as this will generate a reminder email when the insurance is due to expire in two weeks. You should use this occasion to check the appropriate documentation (such as MOT and driver's license) yearly to ensure standards. Please note that if the employee gets a new vehicle, the insurance expiry date will have to be changed to reflect the new vehicle's insurance. In case of two simultaneous vehicles, please use the earliest insurance expiry date only. Press 'Save' to save any changes made. By filling in this form you confirm that you have seen and checked the documentation.

At the bottom of this screen it will also give the option of selecting a 'mileage allowance'. This will only need to be used on initial set up of a new user. If, as the manager, you indicate 'Low' a scheme will be attached by Payroll. Any selection of 'Mid' or 'High' will need to be verified with HR before Payroll attach the scheme. No claims will be able to be sumbitted without both a scheme attached and a car set up.

3.1.5. Attached vehicles

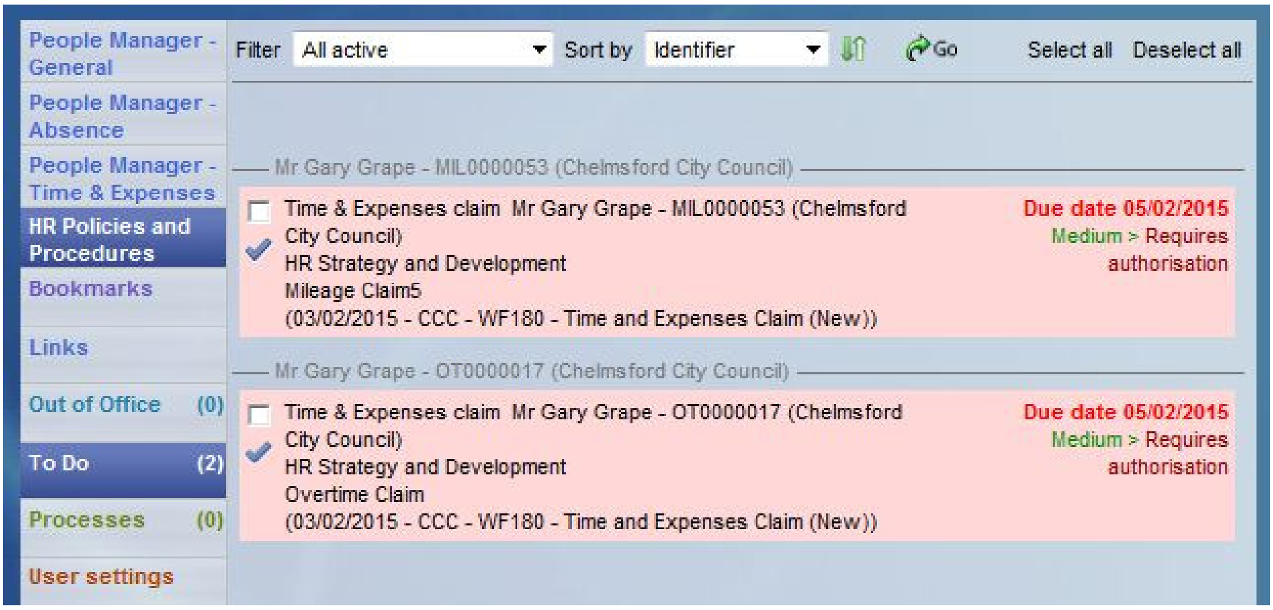
Some employees will have company (lease) vehicles that are not listed under 'Private Vehicles' and do not need to be set up by the manager. Details of lease vehicles are passed directly from accountancy to Payroll for set up. If an employee queries which car is set up (as they can not see lease cars in ESS) then you should be able to see this listed under 'attached vehicles'They may or may not show that multiple drivers are attached to that vehicle.



3.2. Claims

Time and Expenses (mileage) claims are now put into iTrent by employees, in a similar way as they would request annual leave. To submit a claim, the employee needs to have both a vehicle and a mileage scheme attached to their profile. Payroll will handle mileage schemes upon request, but the manager should take care of the vehicle (as above). For detailed information on how to put in a claim, please refer to the Employee Self-Service Guide.

When an employee requests a claim, they will go to the reporting manager for authorisation, the same way holiday requests do. It will come up in your to-do list for authorisation, and you will be sent an email with a brief summary and a link to further details.



Click on a request to see the details of the request. To authorise, click on a box to tick it and press ‘Actions’ as you would with leave requests. If you are uncomfortable with authorising a claim for whatever reason (for example because of the amount of money involved), you can redirect the request to your manager instead.

You cannot amend requests, so if a mistake was made, please reject the request. The unauthorised request will go back to the employee as a provisional claim, so you should speak to your employee about the mistake and have them resubmit a corrected version for authorisation.

If an employee spots a mistake and cancels the claim before you authorise it, it will be removed from your to-do list and you will be sent an email and the process will start again from the beginning.
Note: Please ensure you check the details carefully before authorising any claims, as you are held responsible for any wrongly authorised claims! This is especially important if you usually authorise leave requests in bulk, as you may inadvertently authorise a wrong claim.

3.2.1. View Time & Expenses Claims

To view all past and current claims, click on an employee and then on 'View – Time & Expenses Claims'. This will bring up a list of all time and expenses claims, as well as their brief details including the type, start date and submitted date, and authorised date (you may have to move to the right to see this). This list includes overtime claims, as well as all provisional claims (which are draft claims).

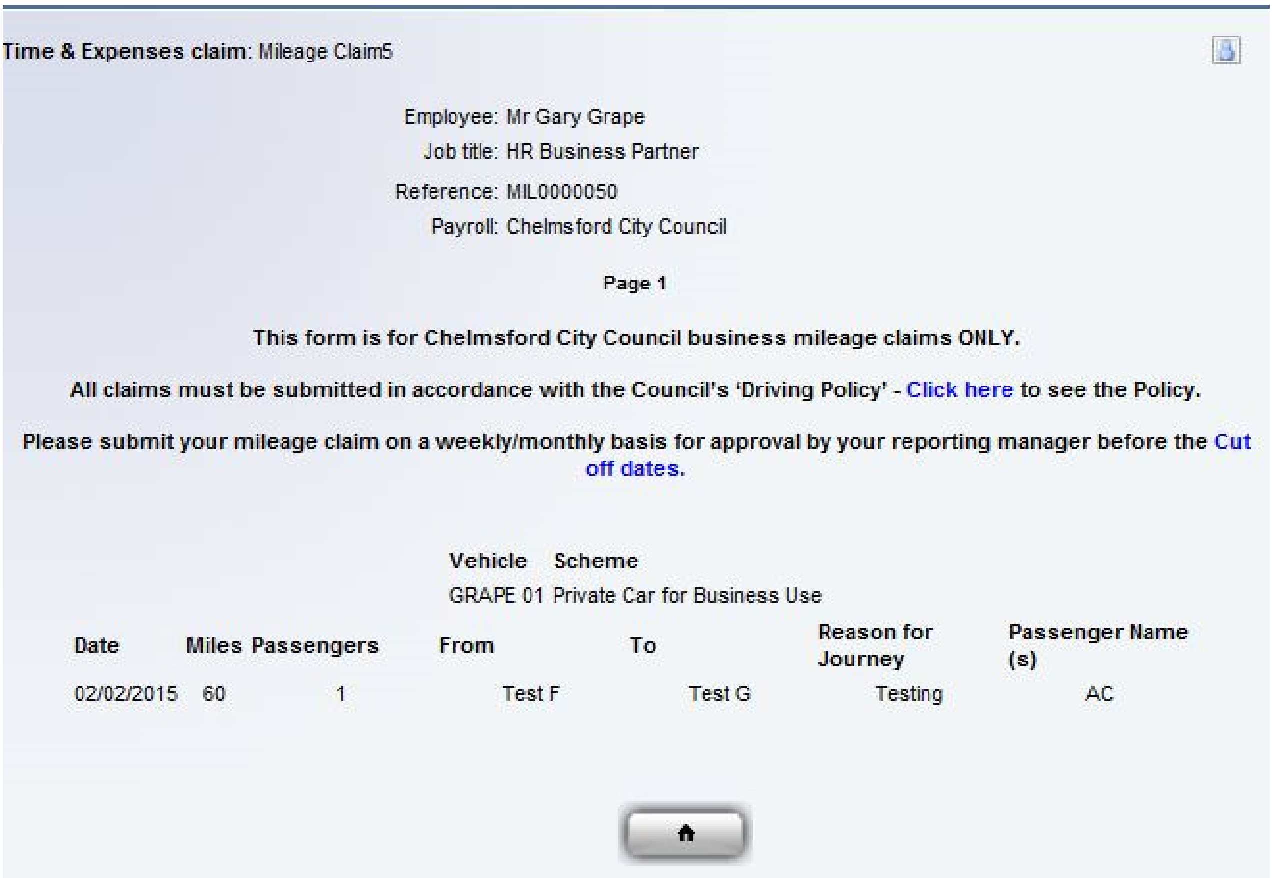
Organisation: Chelmsford City Council People: Grape, Gary Time & Expenses claims: Milea

Select all

Claim	Reference	Payroll	Job title	Start date	Submitted date	Authorised date
Mileage Claim5	MIL0000050	Chelmsford City Council	HR Business Partner	02/02/2015	02/02/2015	02/02/2015
Mileage Claim5	MIL0000054	Chelmsford City Council	HR Business Partner	01/02/2015	03/02/2015	
Overtime Claim	OT0000017	Chelmsford City Council	HR Business Partner	01/02/2015	03/02/2015	
Overtime Claim	OT0000018	Chelmsford City Council	HR Business Partner	01/02/2015		
Overtime Claim1	OT0000027	Chelmsford City Council	HR Business Partner	19/01/2015	19/01/2015	19/01/2015
Mileage Claim2	MIL0000126	Chelmsford City Council	HR Business Partner	19/01/2015	21/01/2015	21/01/2015
Mileage Claim2	MIL0000127	Chelmsford City Council	HR Business Partner	19/01/2015	22/01/2015	22/01/2015
Mileage Claim2	MIL0000109	Chelmsford City Council	HR Business Partner	19/01/2015	19/01/2015	19/01/2015
Mileage Claim2	MIL0000101	Chelmsford City Council	HR Business Partner	15/01/2015	15/01/2015	15/01/2015
Mileage Claim2	MIL0000128	Chelmsford City Council	HR Business Partner	06/01/2015	22/01/2015	22/01/2015
Mileage Claim2	MIL0000100	Chelmsford City Council	HR Business Partner	05/01/2015	15/01/2015	15/01/2015
Mileage Claim5	MIL0000015	Chelmsford City Council	HR Business Partner	01/01/2015	23/01/2015	23/01/2015
Mileage Claim2	MIL0000058	Chelmsford City Council	HR Business Partner	01/01/2015	06/01/2015	06/01/2015
Mileage Claim2	MIL0000064	Chelmsford City Council	HR Business Partner	01/01/2015	06/01/2015	06/01/2015
Overtime Claim1	OT0000026	Chelmsford City Council	HR Business Partner	01/01/2015	19/01/2015	19/01/2015
Overtime Claim	OT0000016	Chelmsford City Council	HR Business Partner	01/01/2015	03/02/2015	03/02/2015
Overtime Claim1	OT0000019	Chelmsford City Council	HR Business Partner	01/01/2015	15/01/2015	15/01/2015
Mileage Claim2	MIL0000110	Chelmsford City Council	HR Business Partner	01/01/2015	19/01/2015	19/01/2015
Mileage Claim5	MIL0000053	Chelmsford City Council	HR Business Partner	01/01/2015	03/02/2015	
Mileage Claim2	MIL0000119	Chelmsford City Council	HR Business Partner	19/12/2014	19/01/2015	19/01/2015
Overtime Claim1	OT0000029	Chelmsford City Council	HR Business Partner	16/12/2014	19/01/2015	19/01/2015
Mileage Claim2	MIL0000117	Chelmsford City Council	HR Business Partner	15/12/2014	19/01/2015	19/01/2015
Mileage Claim2	MIL0000124	Chelmsford City Council	HR Business Partner	01/12/2014	19/01/2015	19/01/2015
Mileage Claim2	MIL0000045	Chelmsford City Council	HR Business Partner	01/12/2014	05/01/2015	05/01/2015
Mileage Claim5	MIL0000055	Chelmsford City Council	HR Business Partner	01/12/2014		

You can also easily use this list to check for duplicate claims. By clicking on any of the claims you will see either the brief details of the claim if authorised, or the details of the request to be authorised.

Authorised:



Time & Expenses claim: Mileage Claim5

Employee: Mr Gary Grape
Job title: HR Business Partner
Reference: MIL0000050
Payroll: Chelmsford City Council

Page 1

This form is for Chelmsford City Council business mileage claims ONLY.

All claims must be submitted in accordance with the Council's 'Driving Policy' - Click here to see the Policy.

Please submit your mileage claim on a weekly/monthly basis for approval by your reporting manager before the Cut off dates.

Vehicle	Scheme
GRAPE 01	Private Car for Business Use

Date	Miles	Passengers	From	To	Reason for Journey	Passenger Name (s)
02/02/2015	60	1	Test F	Test G	Testing	AC

Time & Expenses claim: Overtime Claim1

Employee: Mr Gary Grape
Job title: HR Business Partner
Reference: OT0000027
Payroll: Chelmsford City Council

Page 1

OVERTIME - SUBSTANTIVE (MAIN) ROLE CLAIM FORM

All overtime hours claimed must be submitted in accordance with the Council's 'Pay Policy' - Click here to see the Policy.

Please submit your claim on a weekly/monthly basis for approval by your reporting manager before the cut-off-date.

	Date	Start Time	End Time	Reason for OT	Total Hours
Overtime @ Plain	19/01/2015	12	13	Test Over - Not Auth	1.00
Overtime @ Plain					
Overtime @ Plain					
Overtime @ Plain					
Overtime @ Plain					

	Date	Start Time	End Time	Reason for OT	Total Hours
Overtime @ 1.5					
Overtime @ 1.5					
Overtime @ 1.5					
Overtime @ 1.5					
Overtime @ 1.5					

Not yet authorised:

Time & Expenses claim: Mileage Claim5

Employee: Mr Gary Grape
Job title: HR Business Partner
Reference: MIL0000054
Payroll: Chelmsford City Council

Page 1

This form is for Chelmsford City Council business mileage claims ONLY.

All claims must be submitted in accordance with the Council's 'Driving Policy' - Click here to see the Policy.

Please submit your mileage claim on a weekly/monthly basis for approval by your reporting manager before the Cut off dates.

Vehicle	Scheme
GRAPE 01	Private Car for Business Use

Date	Miles	Passengers	From	To	Reason for Journey	Passenger Name (s)
02/02/2015	15	1	Civic	South Woodham Ferr	REcruitment Session	Keith Gladden

Time & Expenses claim: Overtime Claim

Employee: Mr Gary Grape
Job title: HR Business Partner
Reference: OT0000017
Payroll: Chelmsford City Council

Page 1

OVERTIME - SUBSTANTIVE (MAIN) ROLE CLAIM FORM

All overtime hours claimed must be submitted in accordance with the Council's 'Pay Policy' - Click here to see the Policy.

Please submit your claim on a weekly/monthly basis for approval by your reporting manager before the Cut off dates.

	Date	Start Time	End Time	Reason for OT	Total Hours
Overtime @ Plain					
Overtime @ Plain					
Overtime @ Plain					
Overtime @ Plain					
Overtime @ Plain					
	Date	Start Time	End Time	Reason for OT	Total Hours
Overtime @ 1.5	03/02/2015	08.00	11.00	Stuff	3.00

Employees should put reasons in their claims that help for you to understand what the claim is for and whether it is valid. Therefore, make sure you agree with your employees on what they key in for each field, so that you know what the claim is about and can authorise or not authorise appropriately.

Note: Please note that the cut-off period for the payment of claims is based on authorisation of requests, not submitting claims, so please ensure you authorise claims in good time (and nudge employees to submit their claims in time if they have outstanding provisional claims).

3.2.2. View Time & Expenses Claims Summary

To view just a summary of a claim and its value, press 'View Time & Expenses Claims Summary' and then select the claim you want a summary for. This will give you details such as the amount of overtime or mileage, and how much the claim is for. Note that overtime amounts are just listed as units of pay, as the amount of cash will vary according to the employee's salary. This summary is the same as can be viewed in Employee Self-Service.

4. HR Policies and Procedures

This link has been setup so that if you require access to any of the HR policies and procedures you can just click on the link required.

A new internet page will open and display the policy you have chosen.

5. Bookmarks

This is a system tab which will be BLANK.

6. Links

Standard links have been set up so that you can access external websites, job vacancies, change your password and memorable information and manage your workflow task settings.

6.1. My Password

The system will notify you when your password needs to be changed with a pop up message in the bottom right hand corner of the home screen.

To change your password click on 'Changing my password' link, fill in the required details and click 'Save'.

NB: Remember your passwords are linked to your other iTrent roles. If you change your password in People Manager this will be your new password to access Employee Self Service and if you are set up as a Recruiting Manager.

Memorable information also gives you the opportunity to add a question / prompt to the system with an answer in case you can not remember your password in the future. Once your memorable information has been populated this would be used if you clicked on 'forgotton password' in the login screen.

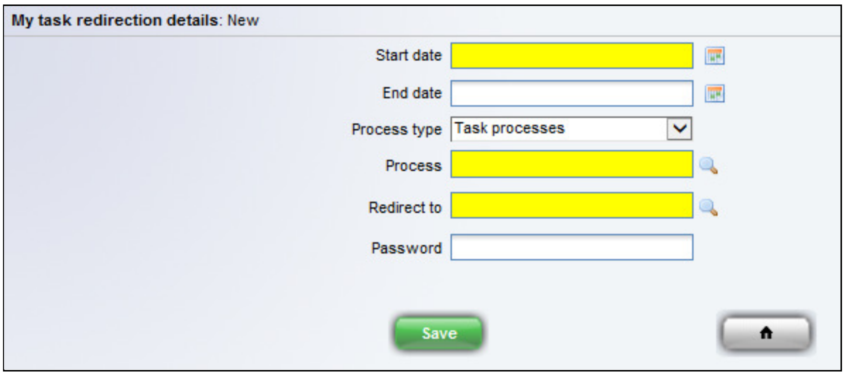
6.2. Workflow Task Settings

Workflow tasks may need to be redirected. This feature is especially important if you are going on leave etc. You can re-direct your tasks during this period until you return.Any tasks not re-directed will continue to be sent to you for your attention on your return. Tasks can be redirected in the following ways:

1. My task redirection and
2. Workflow redirection details

6.2.1. New – Workflow redirection

To setup a workflow re-direction click on the New – Workflow redirection link. My task redirection details: New screen will be displayed.



Field descriptions:

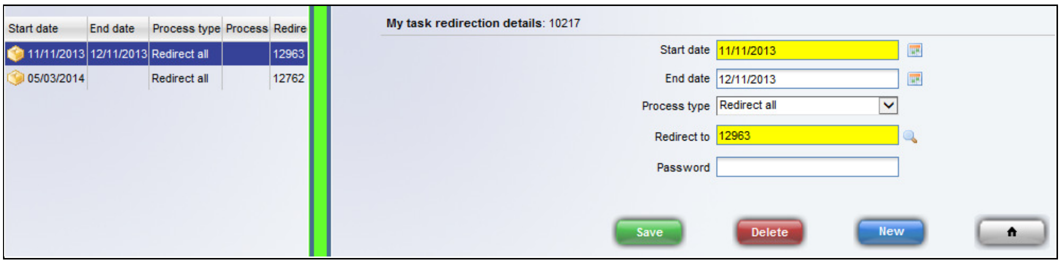
Start date	Redirection rules must have a Start date (which can be forward dated).
End date	Redirection rules can have an optional End date.
Process type	Task processes allows redirection of a specific workflow task. The task processes currently being authorised are: 1. CCC - WF75 - Holiday absence in Self Service 2. CCC - WF76 - Other Absence in Self Service alternatively; Redirect all Redirects all workflows regardless of type.
Process	The Process type drop down box contains all of the available types.
Redirect to	The redirection user is selected by using the Search icon and searching the organisation for the appropriate person.

Password – once you have completed all the relevant fields to redirect your workflows you will need to complete the password field with <u>your password</u> before saving.

6.2.2. Workflow redirection

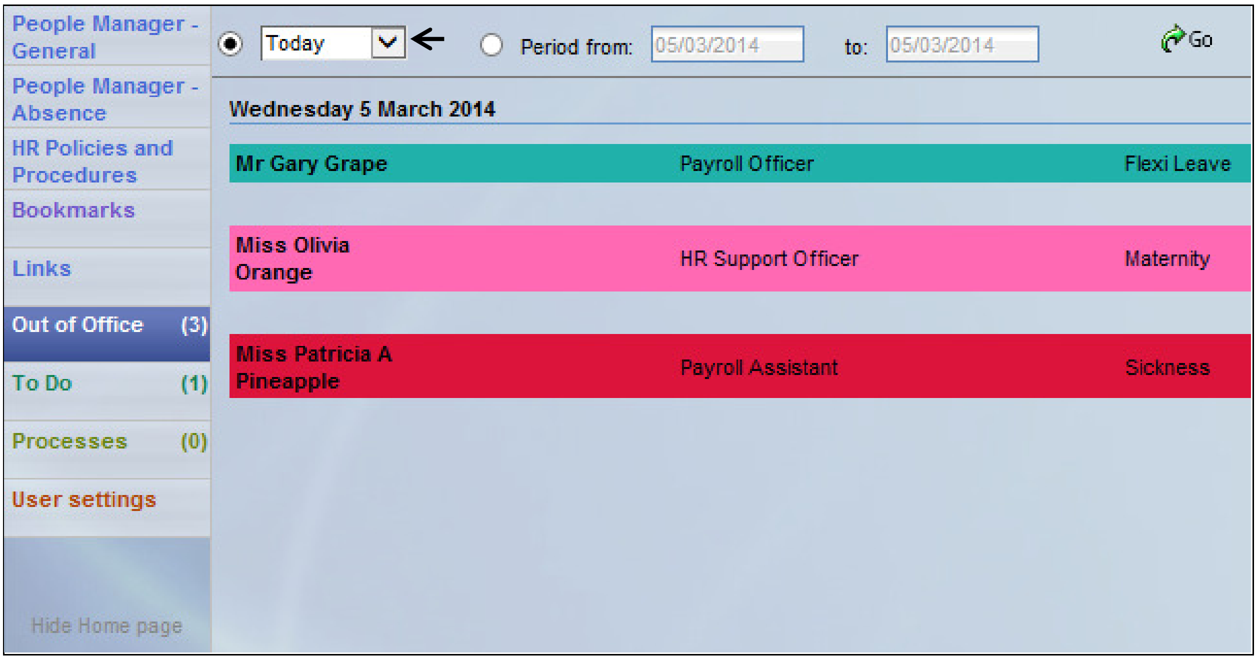
To view workflow redirections that you have set up, or to amend/end that redirection click on the Workflow redirection link.

If you have more than one workflow redirection set up you will be prompted to select the required start date in the Object Pane.



7. Out of Office

This section will list all of the staff from your reportees who have been identified to iTrent, as being out of office. The default is set to Today.



The staff members that have been identified as being out of office will have an absence recorded in iTrent.

Absences are displayed in day of the week order and are colour coded to indicate the type of absence. The colours used are those that you can control in the colour options on the Absence calendar (see 2.5.3).

Each absence lists the name of the person, their position and the type of absence.

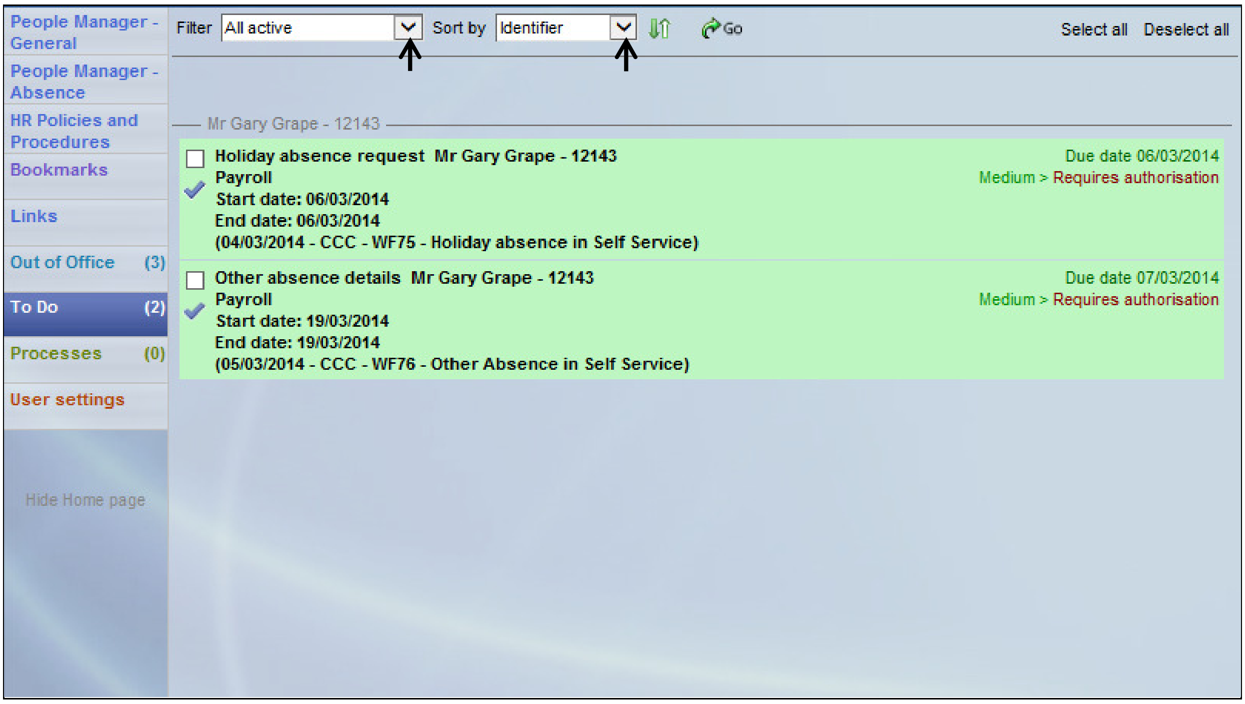
You can modify the display using the controls at the top of the page. The drop down menu enables you to select Today, Tomorrow, This week and Next week. Alternatively you can select to display a specific date rage using the Period from and to date fields. If you change the selection you should then click the refresh icon Go to have the data displayed.

Each row displayed is also a hyperlink and when clicked will display the Absence calendar.

As default the out of office will show you 3 levels of out of office, this can be increased or decreased in the user settings as required / appropriate.

8. To Do

This section displays tasks that need your attention. These will include holiday and other absence authorisation requests from staff members.



To do lists are date and time dependant, the screen area will be refreshed on a regular interval set by a value in your User Settings area under Workflow as Search for new tasks every (seconds). Currently set to search every 60 seconds. Clicking on a task in the To Do list will take you through to the request, the authorisation is always done from the to do list as per 7.2 below.

8.1. Display details

Filter	The Filter drop down menu at the top of the display is used to select the relative importance of any stored To do items. Select one of the following: 1. All 2. Authorisation 3. Complete 4. On Hold 1. Overdue 2. Priority (high) 3. Priority (low) 4. Priority (medium) You are informed if no tasks are found with the required priority otherwise the tasks are listed.
Sort by	You can sort the displayed list of tasks using the Sort by drop down menu. This holds the following options: 1. Completed 2. Description 3. Due date 4. Extension 6. Priority 7. Process name 8. Status 9. Step

	5. Identifier	10. Task type

	You can also sort the displayed list using the Ascending/Descending icon . The up and down arrows on the icon will change to green to inform you how the data is being presented.
	If required you can click the refresh icon  to force a refresh of the page.
Select all	If required you can also click the Select all label and all of the listed tasks will be selected or Deselect all and all of the tasks will be deselected.
Deselect all	If required you can also click the Select all label and all of the listed tasks will be selected or Deselect all and all of the tasks will be deselected.

This icon identifies a task that requires Authorisation.

The colours of the tasks identify their type and priority:

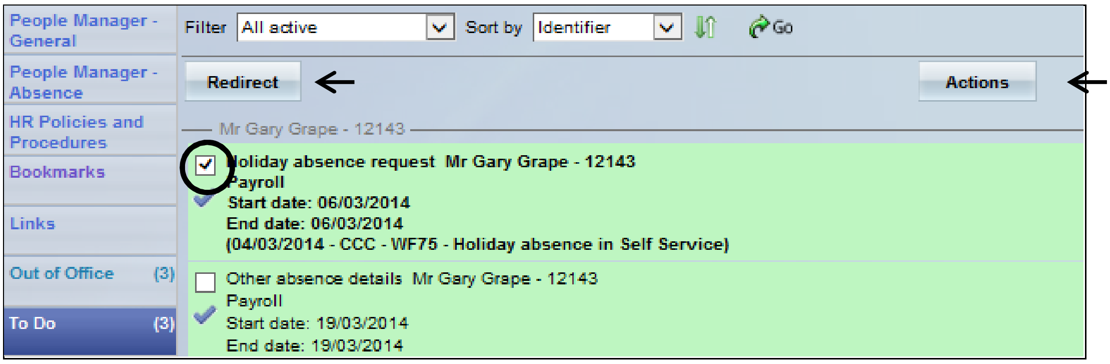
Green tasks - require authorisation
Red tasks - are overdue tasks (awaiting authorisation for more than 5 days).

Each task will display:

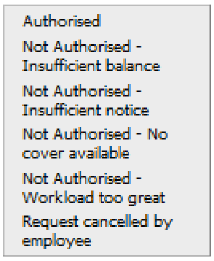
- The page requiring action (Absence details, Salary details etc.)
- The name of the employee and their position
- The date the task was created
- The due date for the task to be completed (This will be in bold when the due date has been passed)
- The priority of the task
- The action required

8.2. Actions and authorising requests

Next to each task there is a check box which when ticked will cause action buttons to be displayed (Redirect and Actions), that are relevant to the selected task. For example:



If you tick a task and then click the 'Actions' button a list of authorisation options will be displayed:



If you click on an action listed, the selected task will be processed against the chosen action.

TIP You can also click the 'Select all' label at the top right hand side of the screen which will automatically tick all of the listed tasks allowing you to process the them all against a selected action.

IMPORTANT - By selecting more than one task you will only be able to process authorised absences only. Not authorised and request cancelled actions will need to be processed on an individual basis.

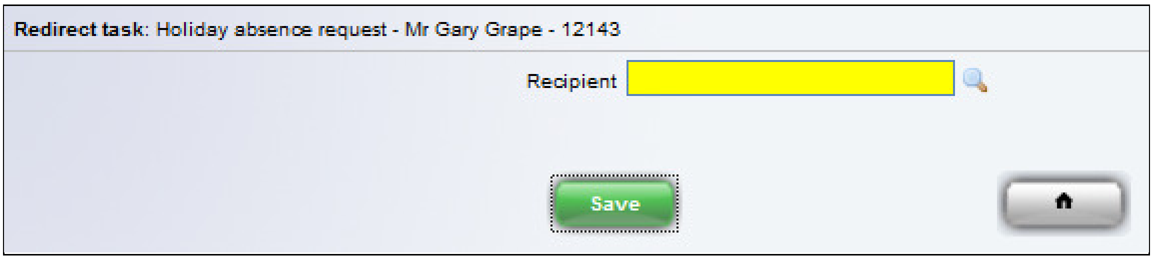
Employees who have requested leave that takes them into a negative balance will stop the manager from selecting the authorise button from actions.

Email confirmation of the absence outcome will be sent to you and your staff member if they have a Council email address. If not they can login into Employee Self Service to check their holiday dates.

8.3. Redirect Tasks

You can also manually redirect the selected task(s) by clicking the 'Redirect' button.

If this button is clicked the Redirect task page is displayed allowing you to search for and select another recipient who will process the task.



NB: Also see section 5.2.1 New – Workflow redirection.

9. Processes

This section will display any background processes that have been completed in the last 24 hours.

Background processes are run for generating People manager reporting lists and reports.

10. User Settings

This page displays user preference setting that you may be able to change. The System administrator has set defaults for your system or function access although there are a couple of options that are amendable by the user.

Appendix A

Authorised Holiday Absence (Ref: WF17B)

Chelmsford City Council

Authorised personal holiday absence

This email is to confirm that an authorised holiday absence has been entered by the manager / an administrator.

Mr Gary Grape (Payroll Officer)
Absence Type: Personal holiday
Start date: 09/07/2014 (FULL)
End date: 09/07/2014 (FULL)

(Added by user: 10217)

This is an automated email - please do not reply
Chelmsford iTrent System
If you would like any support with this or any other HR or Payroll related issue then please contact us on:
HR - 01245 606440 / Payroll - 01245 606513

Appendix B

Amended Holiday Absence (Ref: WF17A)

Chelmsford City Council

Amended authorised personal holiday absence

This email is to confirm that the below authorised holiday absence has been amended by the manager / an administrator.

Mr Gary Grape (Payroll Officer)
Absence Type: Personal holiday

Previous - Absence details
Start date: 09/07/2014 (FULL)
End date: 09/07/2014 (FULL)

Amended to - Absence details
Start date: 09/07/2014 (HALF_PM)
End date: 09/07/2014 (HALF_PM)

(Amended by user: 10217)

This is an automated email - please do not reply
Chelmsford iTrent System
If you would like any support with this or any other HR or Payroll related issue then please contact us on:
HR - 01245 606440 / Payroll - 01245 606513

Appendix C

Authorised Flexi Leave Absence (Ref: WF52A)

Chelmsford City Council

Authorised Flexi Leave absence

This email is to confirm that an authorised Flexi Leave absence has been entered by the manager / an administrator.

Mr Gary Grape (Payroll Officer)
Absence Type: Flexi Leave
Start date: 11/07/2014 (FULL)
End date: 11/07/2014 (FULL)

(Added by user: 10217)

This is an automated email - please do not reply
Chelmsford iTrent System
If you would like any support with this or any other HR or Payroll related issue then please contact us on:
HR - 01245 606440 / Payroll - 01245 606513

Appendix D

Amended Flexi Leave Absence (Ref: WF52B)

Chelmsford City Council

Amended authorised Flexi Leave absence

This email is to confirm that the below authorised Flexi Leave absence has been amended by the manager / an administrator.

Mr Gary Grape (Payroll Officer)
Absence Type: Flexi Leave

Previous - Absence details
Start date: 11/07/2014 (#FULL)
End date: 11/07/2014 (FULL)

Amended to - Absence details
Start date: 10/07/2014 (FULL)
End date: 10/07/2014 (FULL)

(Amended by user: 10217)

This is an automated email - please do not reply
Chelmsford iTrent System
If you would like any support with this or any other HR or Payroll related issue then please contact us on:
HR - 01245 606440 / Payroll - 01245 606513

Appendix E

Notification of sickness absence start date (Ref: WF150)

Chelmsford City Council

Sickness Absence - Start date

This email is to confirm that a sickness absence start date has been entered by the manager / an administrator.

Mr Gary Grape (Payroll Officer)
Absence Type: Sickness
Start date: 23/06/2014 (FULL)
Absence reason: Allergy

(Added by user: 10217)

This is an automated email - please do not reply
Chelmsford iTrent System
If you would like any support with this or any other HR or Payroll related issue then please contact us on:
HR - 01245 606440 / Payroll - 01245 606513

Appendix F

Notification of sickness end date (Ref: WF151)

Chelmsford City Council

Sickness Absence - End Date

This email is to confirm that the sickness absence end date has been entered by the manager / an administrator. Please ensure that a Return To Work Interview is completed if you have not done so already.

Mr Gary Grape (Payroll Officer)
Absence Type: Sickness
Start date: 01/07/2014 (FULL)
End date: 01/07/2014 (FULL)
Absence reason: Cough and / or Cold

(Added by user: 10217)

This is an automated email - please do not reply
Chelmsford iTrent System
If you would like any support with this or any other HR or Payroll related issue then please contact us on:
HR - 01245 606440 / Payroll - 01245 606513

Appendix G

Sickness absence reason amended (WF151)

Chelmsford
City Council

Sickness Absence - Amended Reason

This email is to confirm that the sickness absence reason has been amended by the manager / an administrator.

Mr Gary Grape (Payroll Officer)
Absence Type: Sickness
Start date: 01/07/2014 (FULL)
End date: 01/07/2014 (FULL)
New absence reason: Cough and / or Cold (Previously: Allergy)

(Added by user: 10217)

This is an automated email - please do not reply
Chelmsford iTrent System
If you would like any support with this or any other HR or Payroll related issue then please contact us on:
HR - 01245 606440 / Payroll - 01245 606513